Full Service Partnership (FSP) Data Collection & Reporting (DCR) Data Analysis Training

Training Slides and Presenter's Notes for Analyzing Data and Creating Reports from DCR Data Extracts

The following document was funded by the Mental Health Services Oversight and Accountability Commission.

4/20/2012

Table of Contents *(click to hyperlink to section)*

Acknowledgements 2
Definitions and Abbreviations 3
Introduction 4
FSP Data Analysis Training Slides 5
- Training Overview 6
- Reference Materials 7
- Downloading FSP Data from DCR 11
  - Section Overview 12
  - Downloading Files 14
  - File Types 16
- Importing CSV Files into PLD Templates 18
  - Section Overview 19
  - PLD Templates Overview 20
  - Encryption 26
  - Importing New Data 27
- Generating Standard Reports in PLD Templates 37
  - Section Overview 38
  - Browse Partner Data Template 39
  - Run Partner Report Template 58
- Application Notes to Create New Reports in PLD Templates 71
  - Section Overview 72
  - Application Notes Overview 73
  - Before Creating a New Report 77
  - Working in Microsoft Access 87
  - Steps to Create Application Note #1 88
- Using Microsoft Excel to Analyze FSP Data 120

User Resources 127

Acknowledgements

We would like to acknowledge the input and materials from various people and organizations. Many documents created by the California Department of Mental Health (DMH) were used as sources and resources for the production of this training.

Due to the Governor's Proposed Budget for FY 2012-13 to eliminate the Department of Mental Health (DMH), MHSA programs and functions will be transferred to other departments. It is proposed that the DCR system will be administered by another department. Since this document was developed at the time DMH maintained the DCR system, DMH is named in the references and links throughout this document. Because the new state entity is not known, whenever "DMH" is used in this document it is intended to also include the new state entity that will take on DMH's responsibilities.

Definitions and Abbreviations

Term	Meaning
3M	Quarterly Assessment
ADL	Activities of Daily Living
Adult	Adults of Ages 26 - 59
BPD	Browse Partner Data
CA-RW	County Administrator, Read/Write
Child/Youth	Children of Ages 0 - 15
CSI	Client Services Information
CSV	Comma-Separated Values
DCR	Data Collection and Reporting
DMH	California Department of Mental Health
FSP	Full Service Partnership
FY	Fiscal Year
HIPAA	Health Insurance Portability and Accountability Act
IADL	Instrumental Activities of Daily Living
IIF	Immediate If Function
ITWS	Information Technology Web Services
KET	Key Event Tracking
MH	Mental Health
MHSA	Mental Health Services Act
MHP	Mental Health Plan
Older Adult	Older Adults of Ages 60+
PAF	Partnership Assessment Form
PHI	Protected Health Information
PLD	Partner-Level Data
Partner	A Client of the Full Service Partnership
RO	Read Only
RPR	Run Partner Report
RW	Read/Write
SB	Security Breach
SQL	Structured Query Language
SSA	State System Administrator
TAY	Transitional Age Youth (Ages 16 – 25)
TOC	Table of Contents

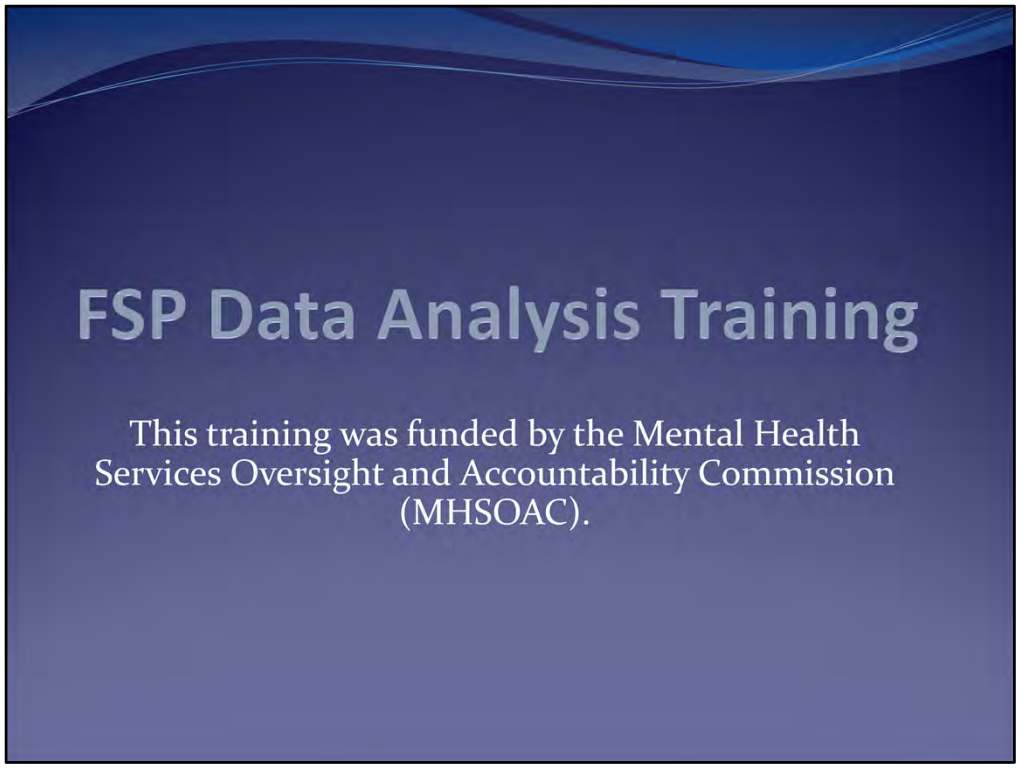
Introduction

This training curriculum is designed to be used as a tool for training staff to use the DCR data extract files to evaluate and analyze FSP data. Trainers can use the PowerPoint presentations available together with this document's presenter's notes to perform employee trainings. Alternatively, employees can follow this manual's slide handouts with text narrative for guided self-instruction to perform the analyses.

This training curriculum covers aspects related to extracting data from the DCR, importing data into Microsoft Access or Microsoft Excel, and building analyses and reports. A separate training curriculum addresses using the features of the FSP DCR to submit FSP data.

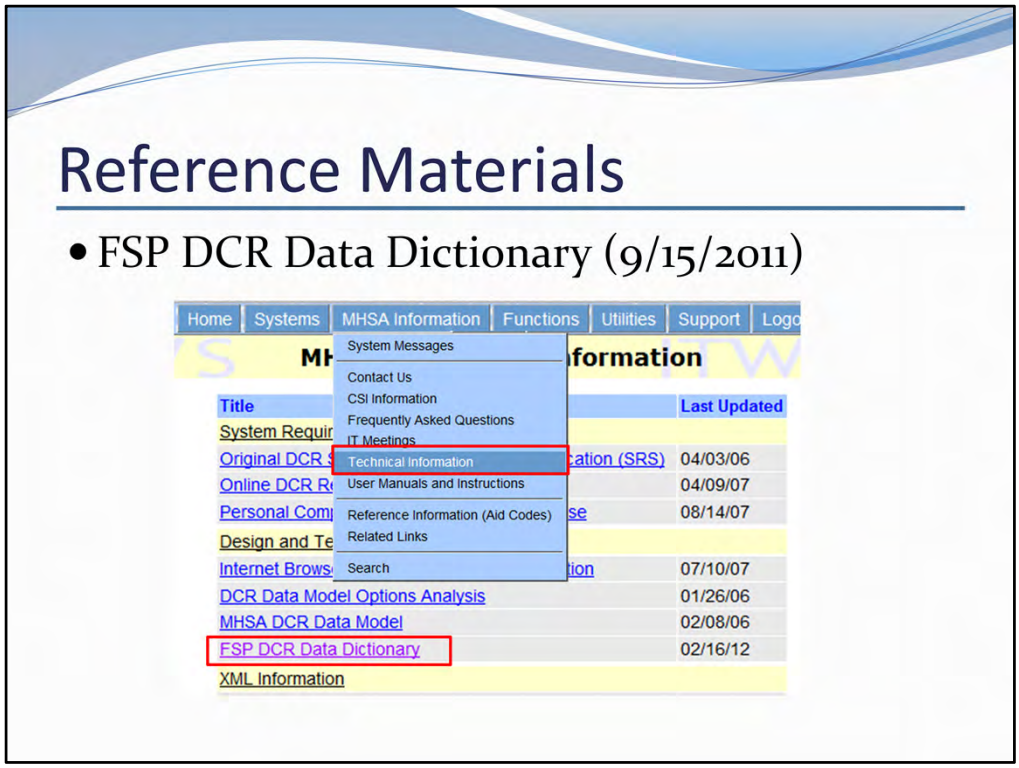
This training curriculum is intended for any person who utilizes the FSP DCR data extracts. This training requires users to download the Partner Level Data (PLD) Templates from the Information Technology Web Services (ITWS) website and is best suited for analysts who have general knowledge of Microsoft Excel, Microsoft Access and the formulas used by these applications. An outline of the training curriculum appears below.

- **FSP Data Analysis Training Curriculum Outline:**
  - **Downloading FSP DCR Data**
    - Data Extraction
    - Overview of DCR Data Extract Files
  - **Utilizing the Partner-Level Report Templates**
    - Importing New Data
    - Utilizing the Browse Partner Template
    - Utilizing the Run Partner Report Template
  - **Developing the Analytical Report in Access from Application Note #1**
    - Creating Supporting Queries
    - Basic Statistical Analysis Formulas
    - Presenting Data in a Report
  - **Developing the Analytical Report in Excel from Application Note #1**
    - Creating New Fields
    - Generating a Pivot Table
    - Statistical Measures by Partner
    - Statistical Measures for All

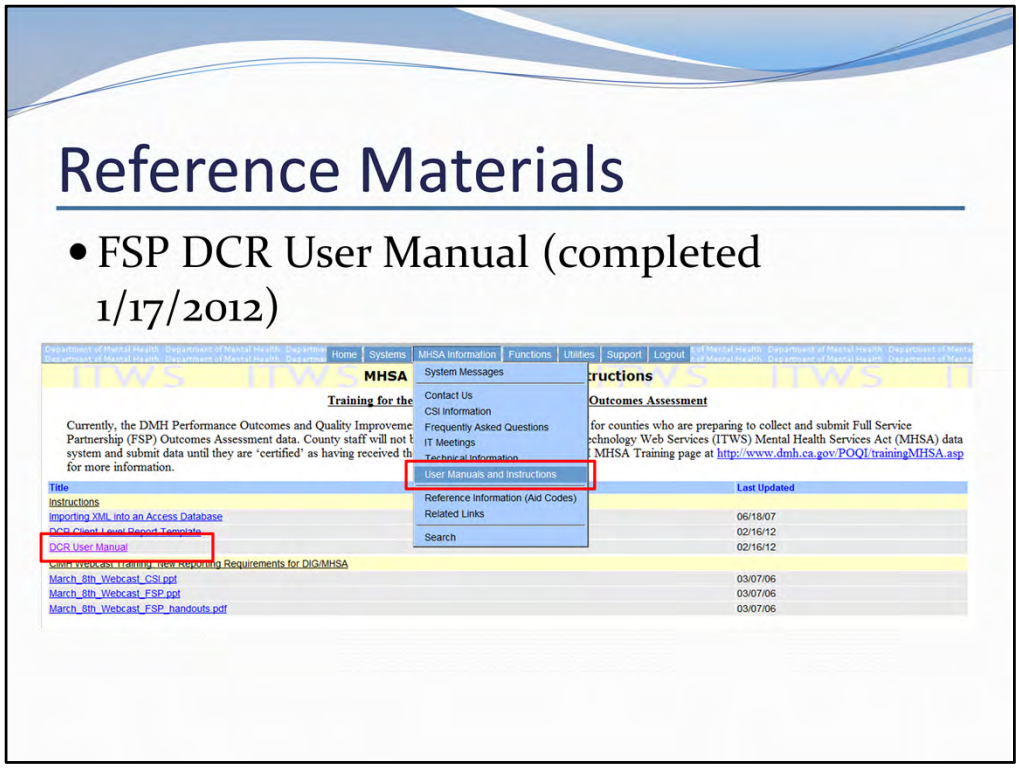

FSP Data Analysis Training
This training was funded by the Mental Health Services Oversight and Accountability Commission (MHSOAC).

Training Overview
1. Download FSP Data from DCR
2. Import FSP Data to PLD Templates
3. Generate Standard Reports
4. Create New Reports

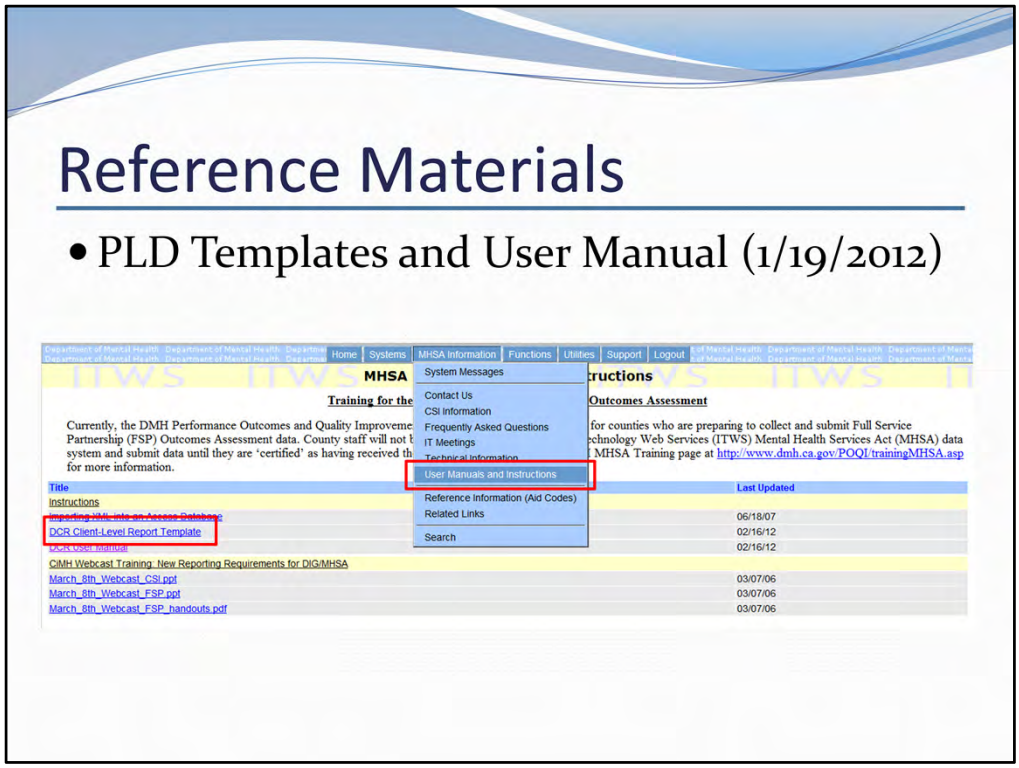
This training covers these main areas of the FSP DCR User Manual (completed 1/17/2012) , the Partner-Level Data (PLD) Templates User Manual (completed 1/19/2012) and the Application Notes (completed 4/5/2012).



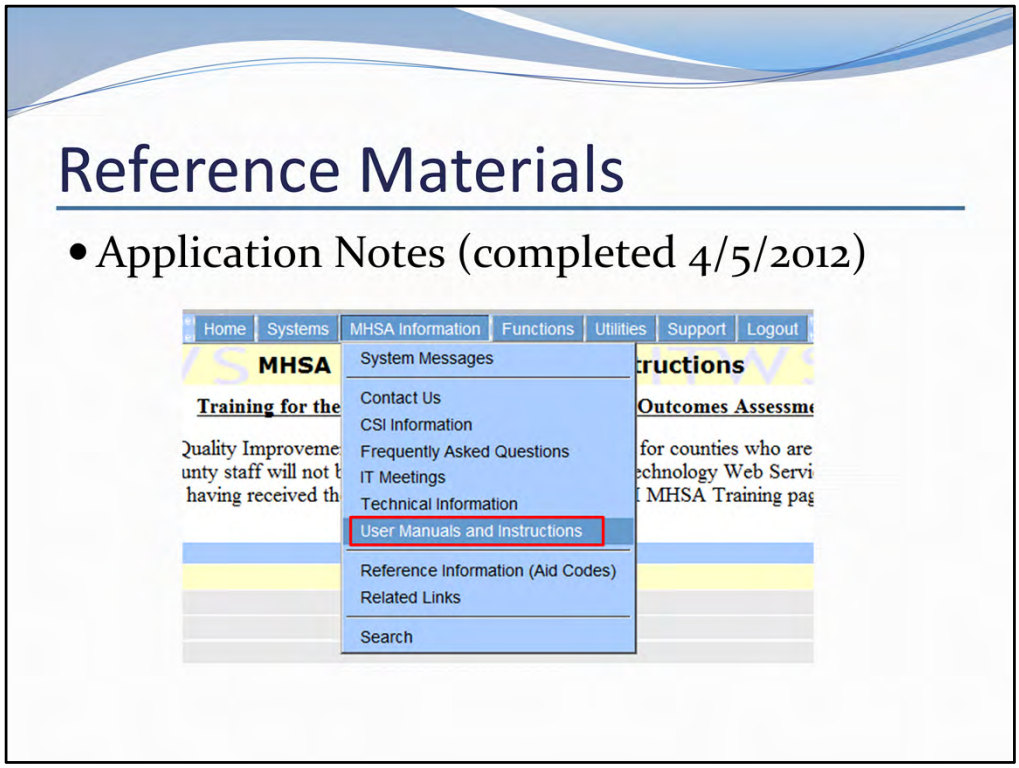
An updated version of the FSP DCR Data Dictionary was completed on 9/15/2011, and it can be accessed on ITWS through the **MHSA Information** menu, by selecting the **Technical Information** submenu and then clicking to download the **FSP DCR Data Dictionary.**



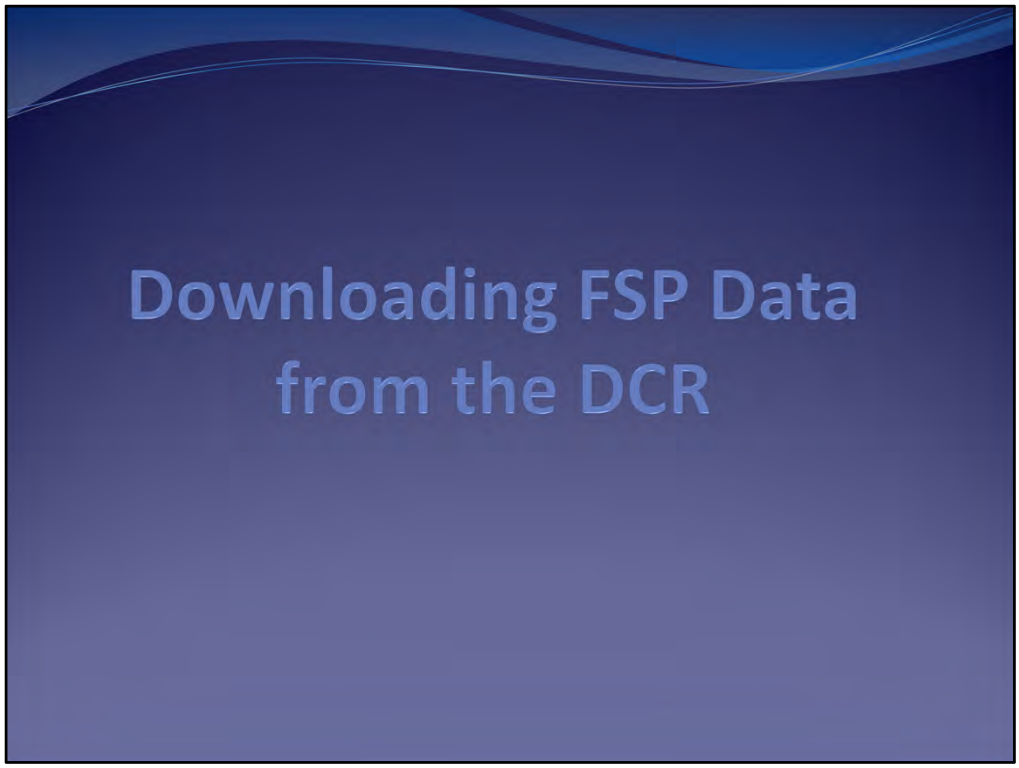
A FSP DCR User Manual was created on 1/17/2012, and it can be accessed on ITWS through the **MHSA Information** menu, by selecting the **User Manuals and Instructions** submenu and then clicking to download the **DCR User Manual**.

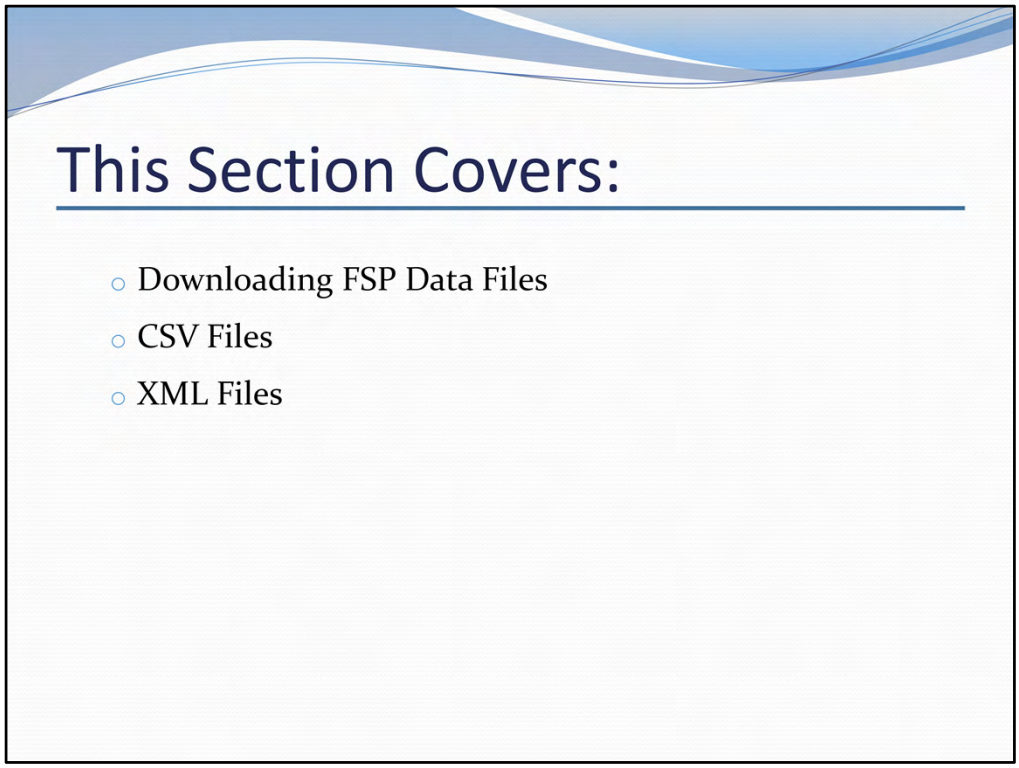


Partner Level Data Templates were created on 1/19/2012, and the Access Database and User Manual can be accessed on ITWS through the **MHSA Information** menu, by selecting the **User Manuals and Instructions** submenu and then clicking to download the **DCR Client-Level Report Template**.

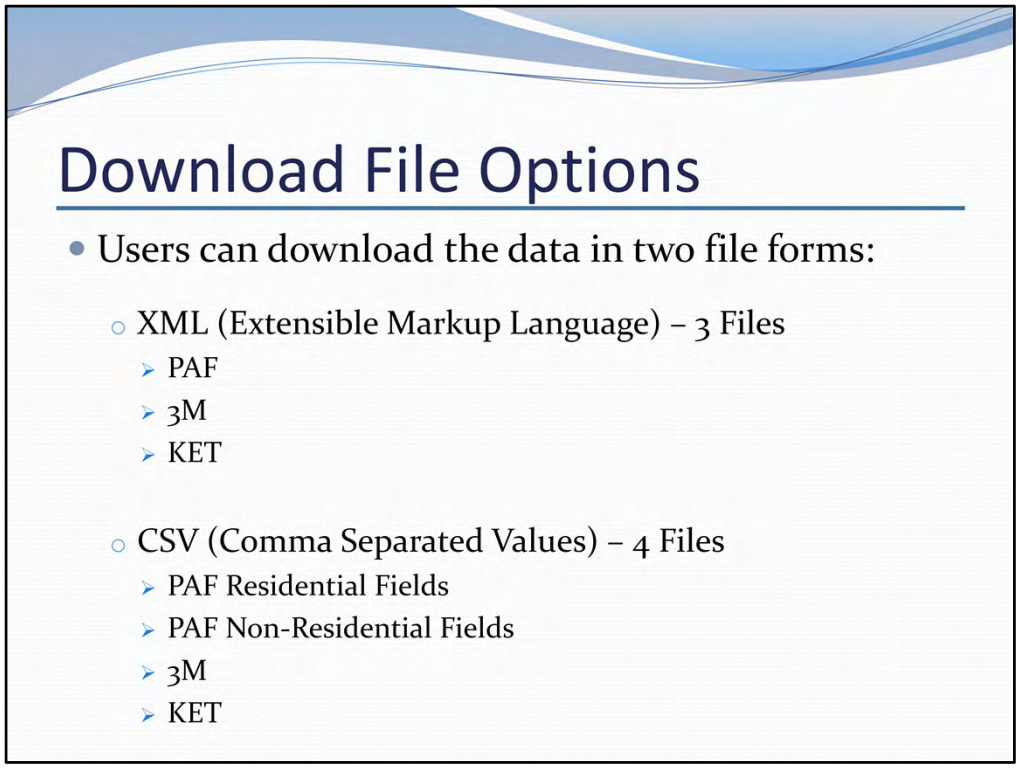


An Application Notes document with instruction for using Microsoft Excel and Microsoft Access to create reports from FSP data downloads was created on 4/5/2012, and the document can be accessed on ITWS through the **MHSA Information** menu, by selecting the **User Manuals and Instructions** submenu. (Note: The document had not been posted at the time of this publication.)

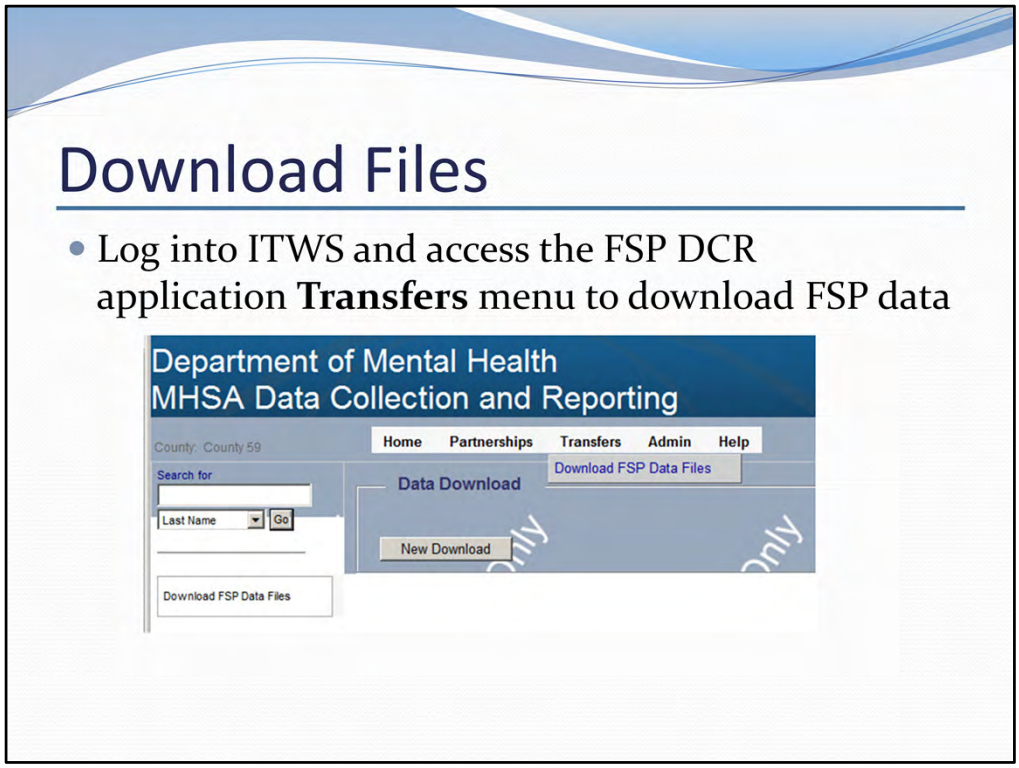

Downloading FSP Data
from the DCR



This section covers downloading CSV and XML file types.

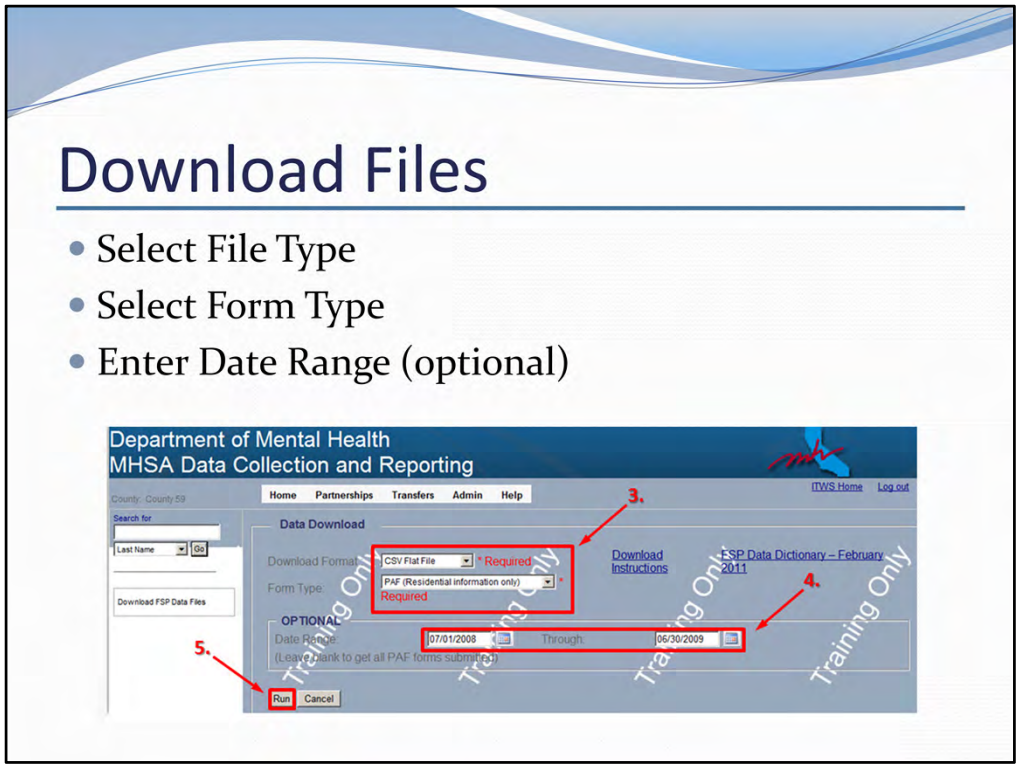


The FSP DCR offers a function for users with the CA-RW role to download all of the partner data to which they have access through their group. The data can be downloaded as XML or CSV files. The XML data downloads into three files (a PAF, a KET and a 3M file). The CSV data downloads into four files (a PAF Non-Residential with all domains EXCEPT Residential, a PAF Residential with residential domain information only, a KET and a 3M file). The XML or CSV files can then be used to perform data analysis and data reporting in other applications such as MS Excel, MS Access, SPSS or SAS.



As seen in this slide, navigate to the **Admin** menu and **Download FSP Data Files** submenu, and select the **New Download** button.

Refer to the FSP DCR User Manual (completed 1/17/2012) at Chapter 12 “Data Extraction” beginning on page 155 for step-by-step instructions.



As seen in this slide as step 3, select the “CSV Flat File” or “XML” file type from the **Download Format** drop-down box. Make a selection in the **Form Type** drop-down box to select one of the available forms to include in the download.

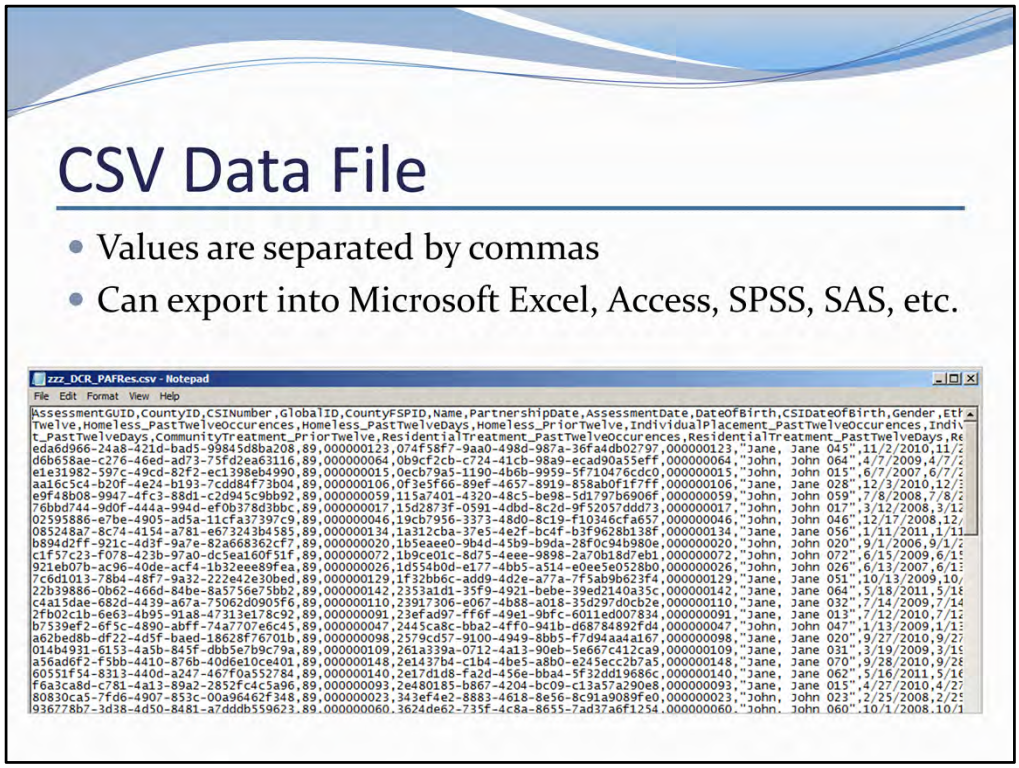
As seen in this slide as step 4, enter a date range for data to be returned. The date range for the PAF restricts records based on **Partnership Date**. The date range for the KET and 3M records restricts based on the date the form was completed (**Date Completed** field). If a date range is not entered, all data will be returned.

As seen in this slide as step 5, select the **Run** button to return the file. You will notice that the web browser will indicate the request is running. It may take several minutes for the data file to download.

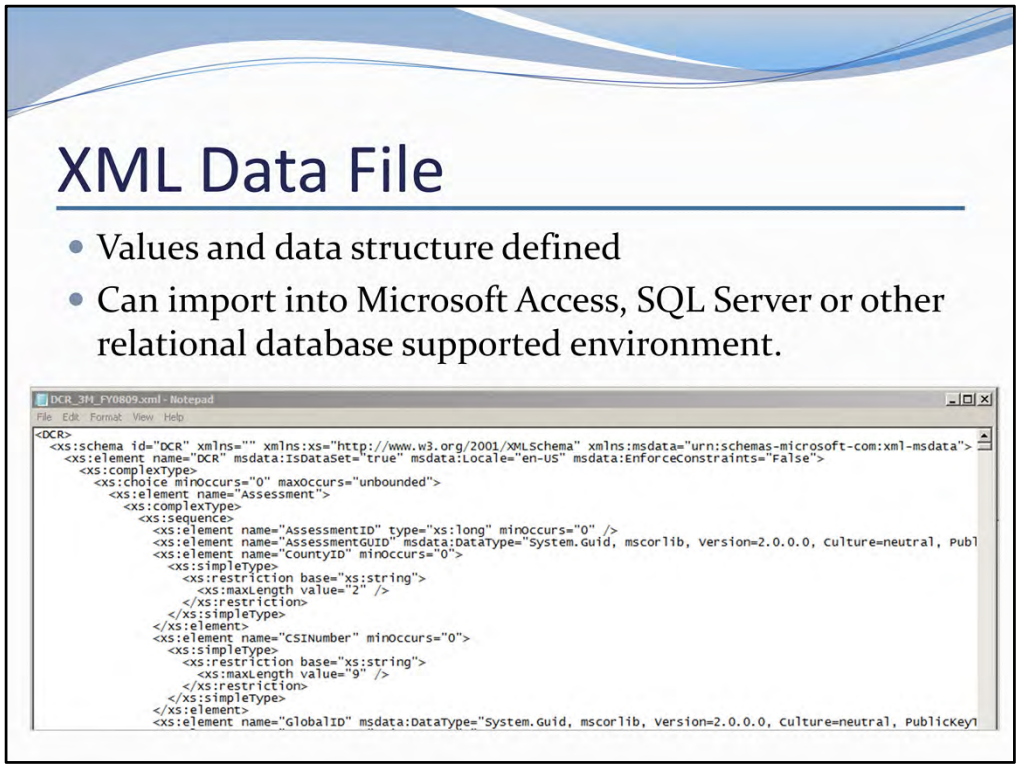
Currently, the FSP DCR will only support downloads of files of approximately < 40 MB. Larger files may cause the FSP DCR to produce an error after several minutes. Reduce the size of the file by restricting to a smaller date range, and retry the download.

Save the file, and return to the menu to download the other data files. For XML file type, download 3 files including the PAF, KET and 3M. For CSV file type, download 4 files including the PAF-Residential, PAF-Non-Residential, KET and 3M.

Refer to the FSP DCR User Manual (completed 1/17/2012) at Chapter 12 “Data Extraction” beginning on page 155 for step-by-step instructions.

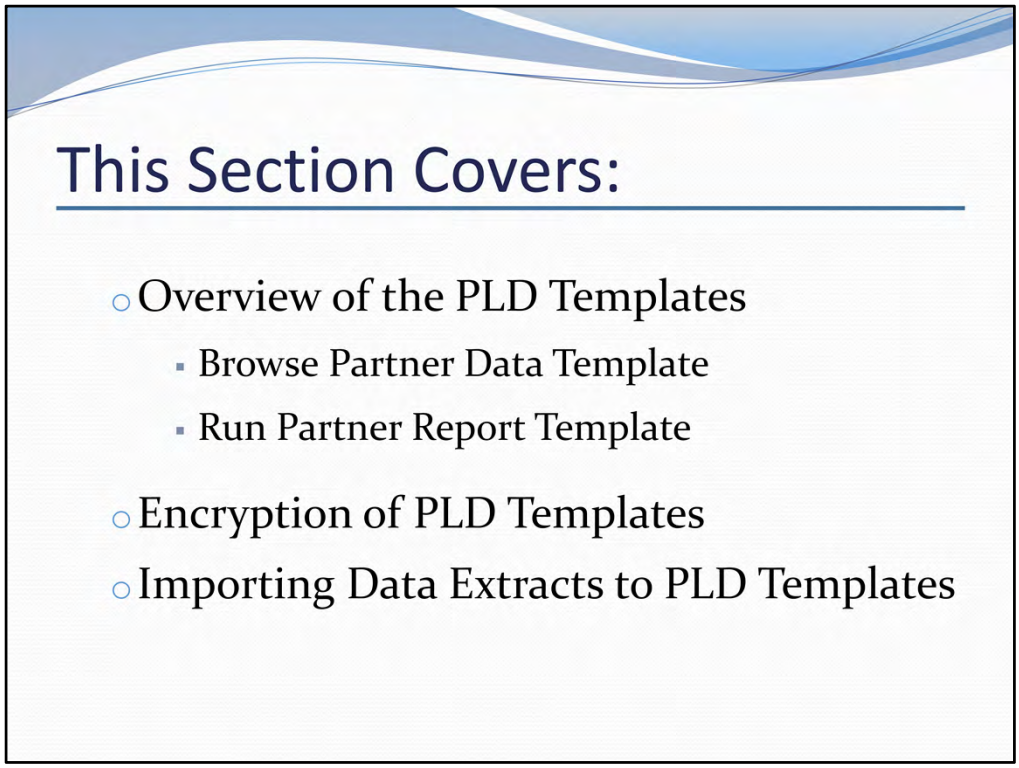


This slide displays an example of the CSV file contents opened in the Notepad application.

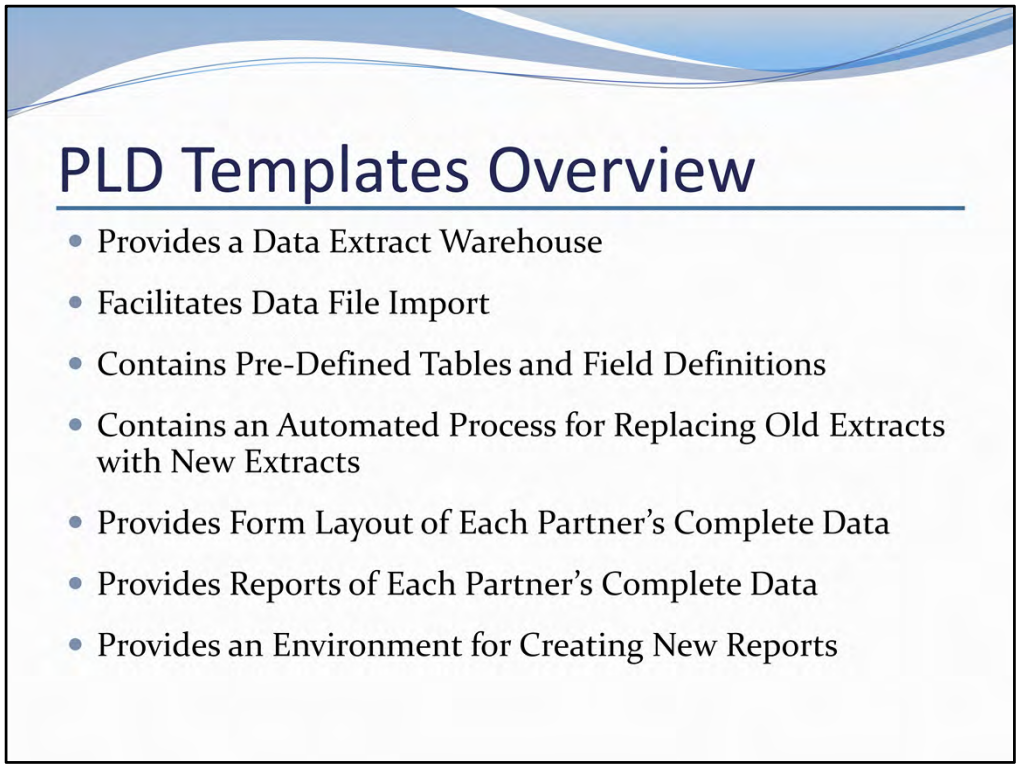


This slide displays an example of the SML file contents opened in the Notepad application.

Importing CSV files into the Partner-Level Data Templates


This Section Covers:
Overview of the PLD Templates
Browse Partner Data Template
Run Partner Report Template
Encryption of PLD Templates
Importing Data Extracts to PLD Templates

This section covers an overview, encryption and data importing for the PLD Templates.

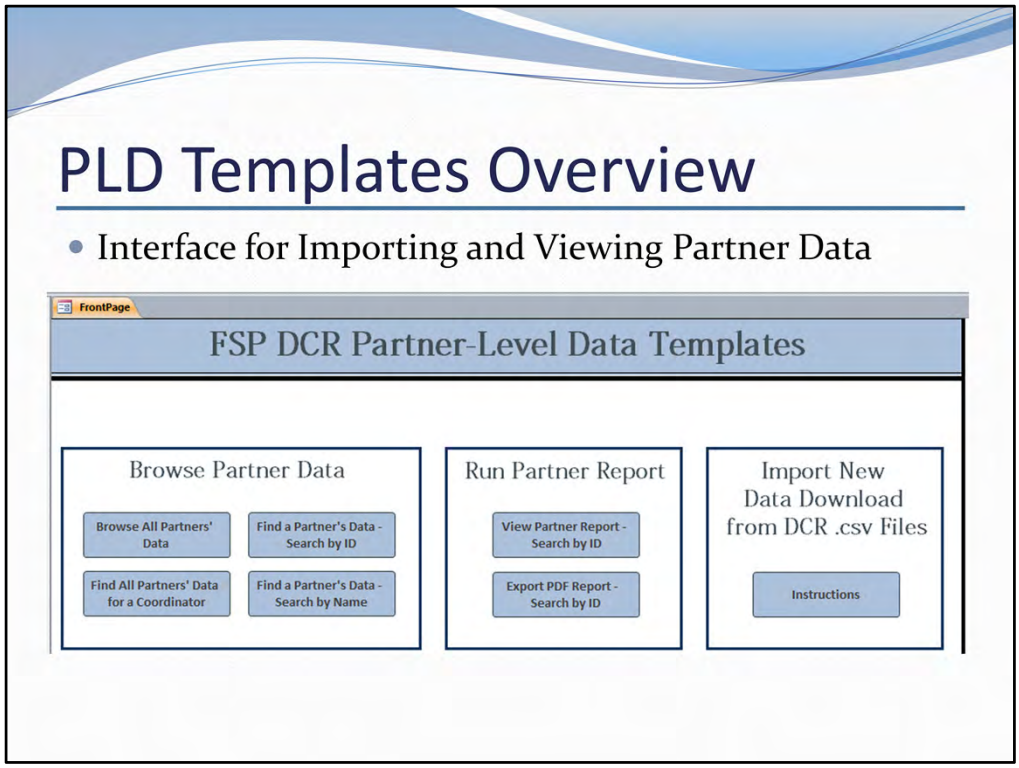

PLD Templates Overview
Provides a Data Extract Warehouse
Facilitates Data File Import
Contains Pre-Defined Tables and Field Definitions
Contains an Automated Process for Replacing Old Extracts with New Extracts
Provides Form Layout of Each Partner's Complete Data
Provides Reports of Each Partner's Complete Data
Provides an Environment for Creating New Reports

The Partner-Level Data (PLD) Templates act as a data extract warehouse and provide fully defined tables to which the DCR CSV files can be easily imported. The PLD Templates also provide tools and instructions to facilitate the import of the DCR CSV files into Microsoft Access.

The PLD Templates contain pre-defined tables which incorporate the coding values for the fields within the CSV files, according to the DCR FSP Data Dictionary. The PLD Templates also include dimension tables which can be used to translate the coding values within the FSP data fields into useful terms and categories. All of these tables are defined already for users utilizing the PLD Templates. The PLD Templates also provide an automated process for clearing and updating data for new DCR CSV downloads.

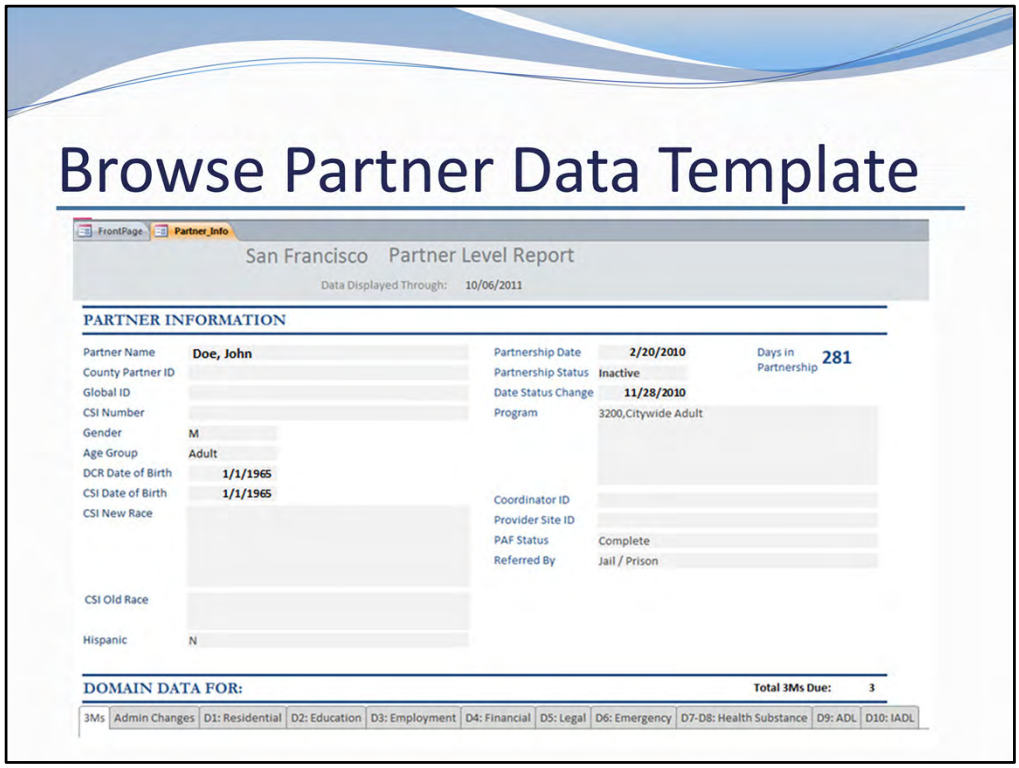
The PLD Templates are designed to provide a comprehensive summary of a partner's Full Service Partnership (FSP) Data Collection and Reporting System (DCR) partnership data for the purposes of data quality. The PLD Templates display and organize domain data for the partnership's current status and history in the last 12 months before joining the FSP. (Information on the time prior to the last 12 months before joining the FSP is not included in these templates.) All administrative changes, such as program or coordinator changes, are also displayed within PLD Templates.

The Application Notes covered later in this training will exemplify how the PLD Templates provide an environment for creating new reports from the FSP data files.


PLD Templates Overview
Interface for Importing and Viewing Partner Data
FrontPage
FSP DCR Partner-Level Data Templates
Browse Partner Data
Browse All Partners' Data
Find a Partner's Data - Search by ID
Find All Partners' Data for a Coordinator
Find a Partner's Data - Search by Name
Run Partner Report
View Partner Report - Search by ID
Export PDF Report - Search by ID
Import New Data Download from DCR .csv Files
Instructions

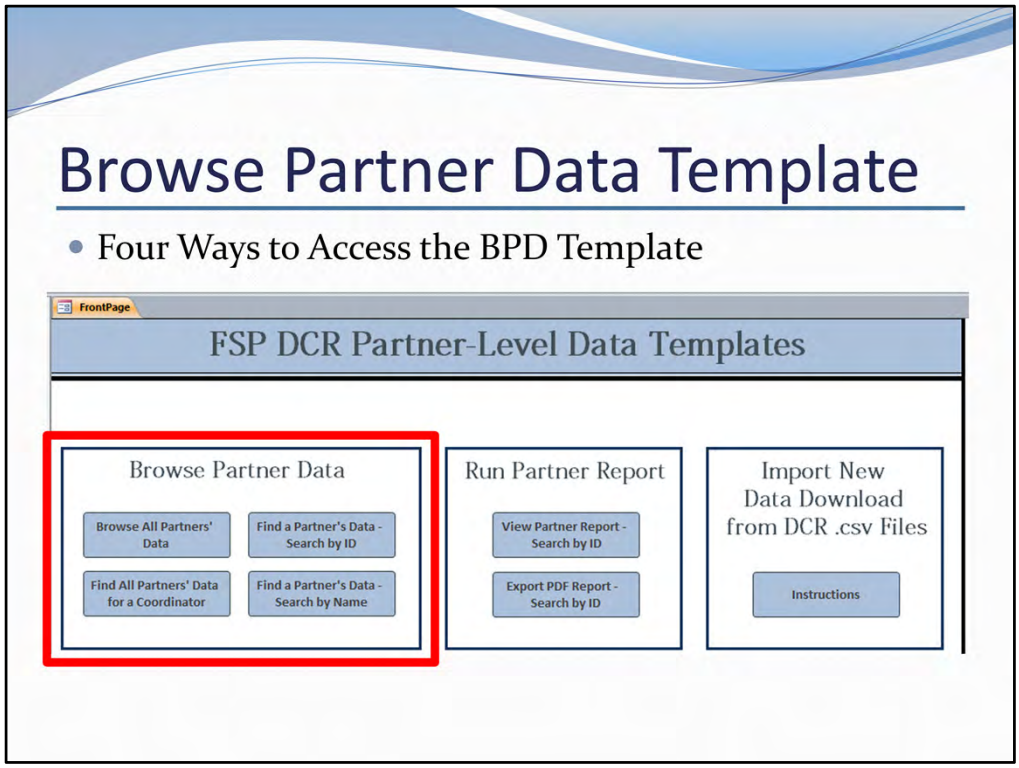
When the PLD Templates file is first opened, a front page is displayed. From the front page, there are two main templates which can be accessed through the PLD Templates. There is also a section for clearing the old data extract and importing a new data extract.

The two templates available in the PLD Templates are:
1. Browse Partner Data (BPD) Template
2. Run Partner Report (RPR) Template



The BPD template allows users to browse through the data of all of the partnerships. As seen in this slide, the BPD template displays an overview of the partnership information and a tab for each domain.

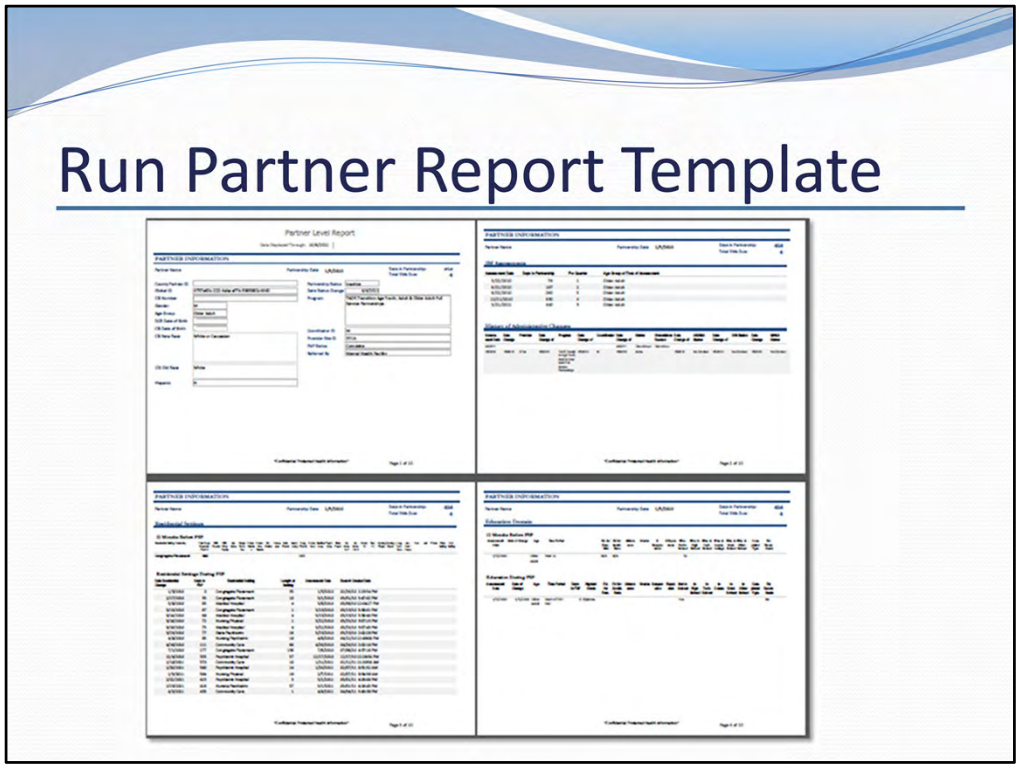
By selecting each tab, users can review all of the FSP data reported for a partnership. Alternatively, users can select one tab of domain information, such as the **D5: Legal** domain for example, and then scroll through each partnership to browse just the data reported for that domain (e.g., legal) for each partnership.


Browse Partner Data Template
Four Ways to Access the BPD Template
FrontPage
FSP DCR Partner-Level Data Templates
Browse Partner Data
Browse All Partners' Data
Find a Partner's Data - Search by ID
Find All Partners' Data for a Coordinator
Find a Partner's Data - Search by Name
Run Partner Report
View Partner Report - Search by ID
Export PDF Report - Search by ID
Import New Data Download from DCR .csv Files
Instructions

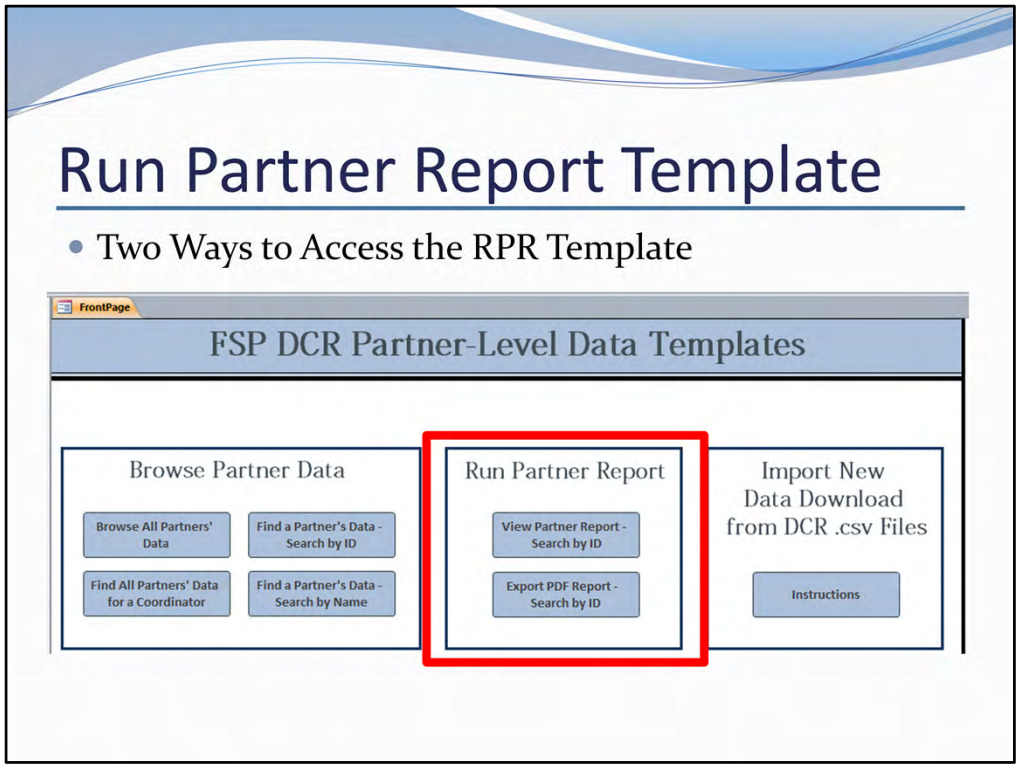
There are four buttons on the front page to access the BPD Template, which will help filter the number of partnerships displayed in the template.

The Four Ways to Access the BPD Template:

1. **Browse All Partners** displays all partnerships downloaded from the FSP DCR.
2. **Find All Partners' Data for a Coordinator** displays all partnerships for a coordinator based on entering any part of the coordinator ID.
3. **Find a Partner's Data – Search by ID** displays the partnership data for a partner by CSI number or by FSP DCR Global ID.
4. **Find a Partner's Data – Search by Name** displays the partnership data for a partner based on entering any part of a partner's name.

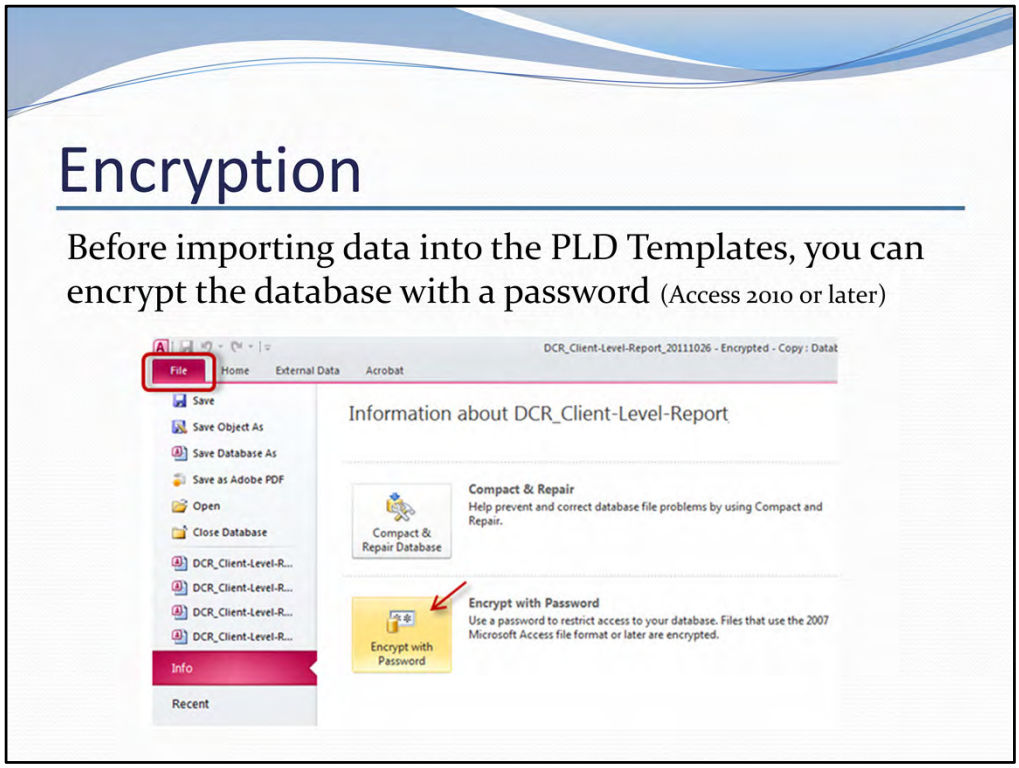


The RPR template produces a printable report of one partnership's data. As seen in this slide, the RPR template displays an overview of the partnership information in a multi-page report which is separated into sections by domain.


Run Partner Report Template
Two Ways to Access the RPR Template
FrontPage
FSP DCR Partner-Level Data Templates
Browse Partner Data
Browse All Partners' Data
Find a Partner's Data - Search by ID
Find All Partners' Data for a Coordinator
Find a Partner's Data - Search by Name
Run Partner Report
View Partner Report - Search by ID
Export PDF Report - Search by ID
Import New Data Download from DCR .csv Files
Instructions

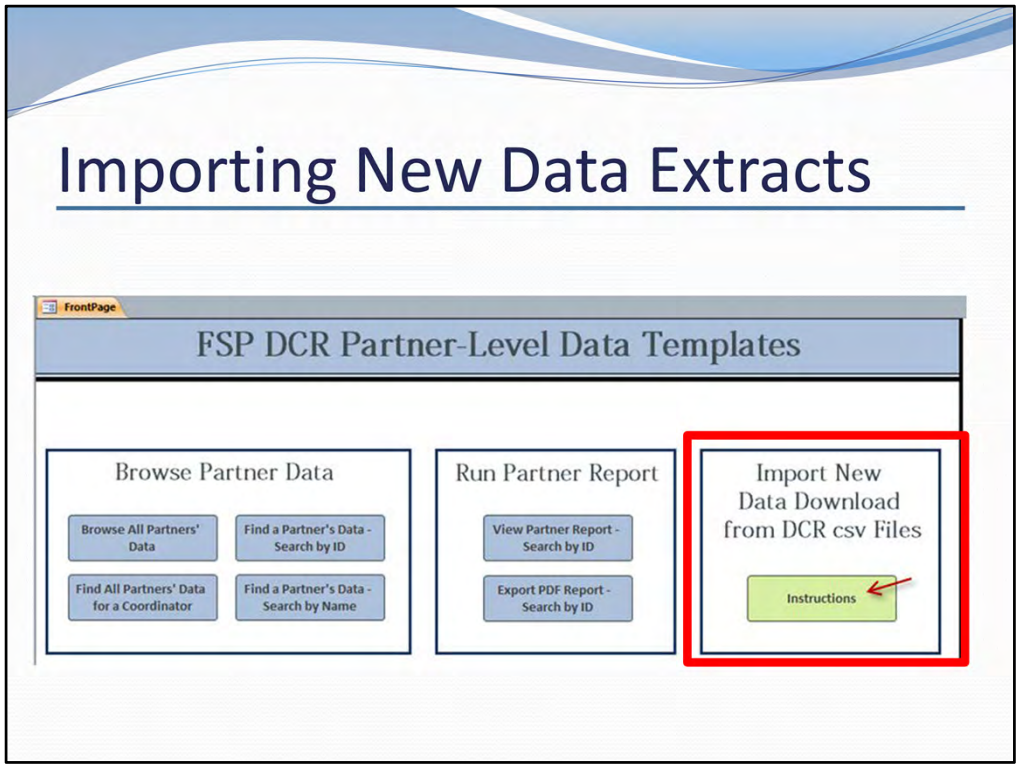
Users can choose to view the partnership report online, print the report or save a PDF of the report on their secure drive/network. A user must have available either the CSI number or the Global ID of a partnership in order to access this template. There are two buttons to launch the RPR template.

The Two Ways to Access the RPR Template:
1. **View Partner Report – Search by ID**: Displays a printable partnership data report for a partnership by CSI number or by FSP DCR Global ID.
2. **Export PDF Report – Search by ID**: Saves a partnership data report as a PDF at a chosen location on the user's drive/network.



The PLD templates come empty of data and equipped with an encrypted password, which will be provided to each Mental Health Director. The encrypted password can be changed. It is most efficient to decrypt and re-encrypt the PLD templates when they are clear of data.

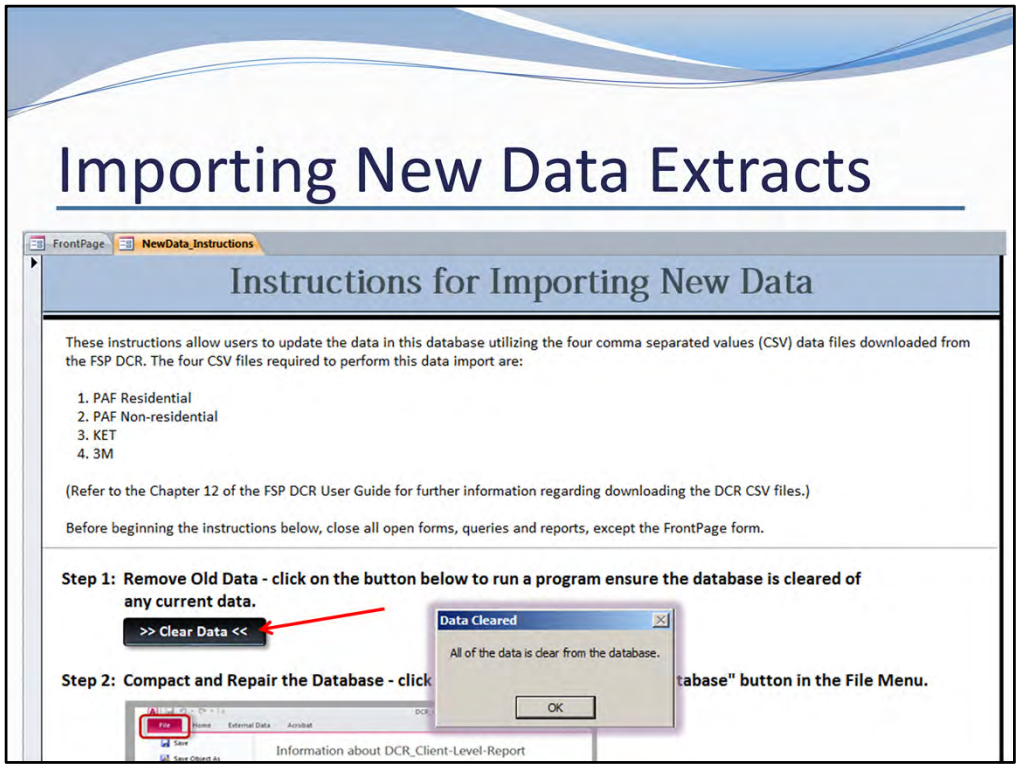
Refer to the PLD Templates User Manual (completed 1/19/2012) at Chapter 1 “Changing the Encrypted Password” beginning on page 10 for step-by-step instructions.


Importing New Data Extracts
FrontPage
FSP DCR Partner-Level Data Templates
Browse Partner Data
Browse All Partners' Data
Find a Partner's Data - Search by ID
Find All Partners' Data for a Coordinator
Find a Partner's Data - Search by Name
Run Partner Report
View Partner Report - Search by ID
Export PDF Report - Search by ID
Import New Data Download from DCR csv Files
Instructions

As mentioned previously, the PLD Templates come empty of data. It is recommended that users store an empty copy of the PLD Templates as a backup in the event that Microsoft Access file corruption issues arise while utilizing the PLD Templates. The PLD Templates are designed for use with the DCR CSV files, which can be downloaded from the online FSP DCR. Users must use the downloaded data files from the online FSP DCR application.

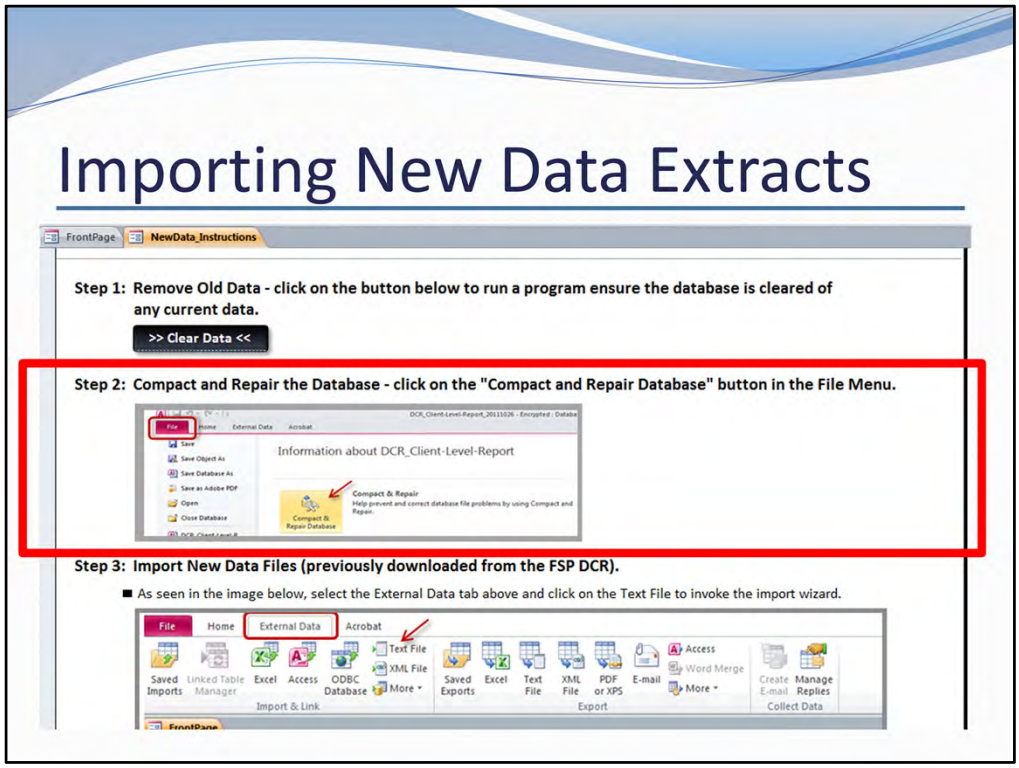
The PLD Templates are designed to work with one entire set of the four downloaded FSP DCR CSV files (PAF Residence, PAF Non-Residence, KET and 3M) at a time. Therefore, when a new updated set of files is downloaded for use with the templates, the old data must be cleared from the database.

With the PLD Template open in Microsoft Access, as seen in this slide, select the **Instructions** button from the front page.

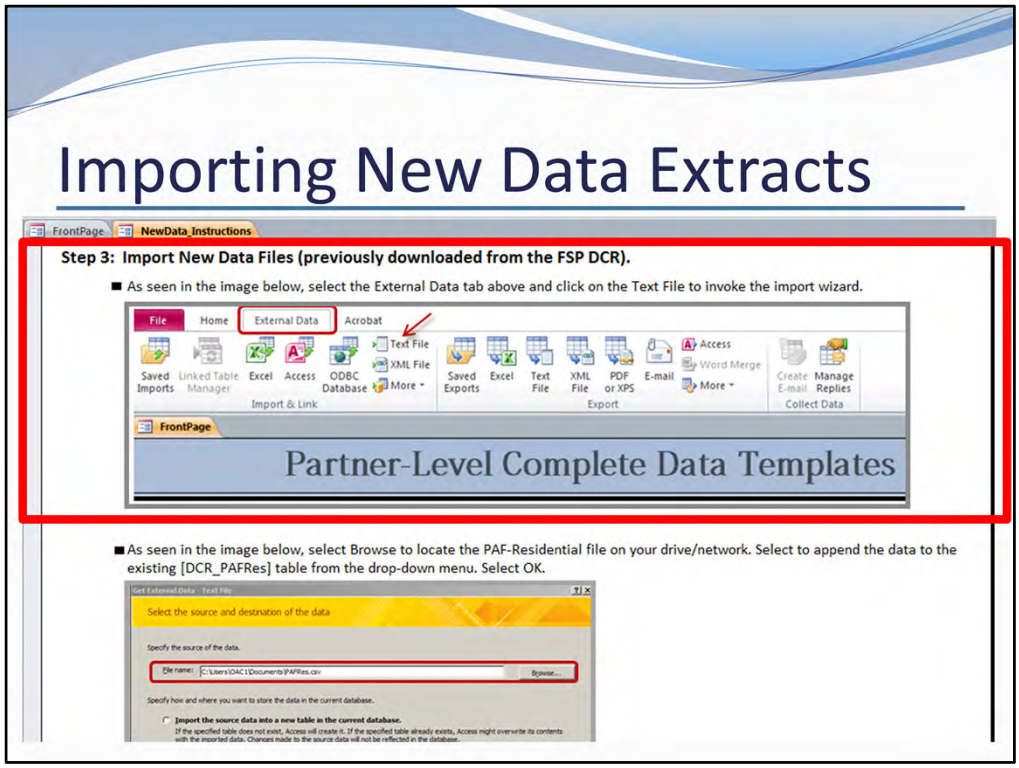

Importing New Data Extracts
FrontPage
NewData_Instructions
Instructions for Importing New Data
These instructions allow users to update the data in this database utilizing the four comma separated values (CSV) data files downloaded from the FSP DCR. The four CSV files required to perform this data import are:
1. PAF Residential
2. PAF Non-residential
3. KET
4. 3M
(Refer to the Chapter 12 of the FSP DCR User Guide for further information regarding downloading the DCR CSV files.)
Before beginning the instructions below, close all open forms, queries and reports, except the FrontPage form.
Step 1: Remove Old Data - click on the button below to run a program ensure the database is cleared of any current data.
>> Clear Data <<
Data Cleared
All of the data is clear from the database.
OK
Step 2: Compact and Repair the Database - click
tabase" button in the File Menu.
Information about DCR_Client-Level-Report

After opening the instructions for importing new data, perform Step 1 from the instructions to clear the data from the database. By selecting the **[>> Clear Data <<]** button, a macro will run to clear all of the existing data in the database. If no data exists in the database, performing this step will not harm the PLD Templates. As seen in this slide, a pop-up message will alert you when the process is complete.

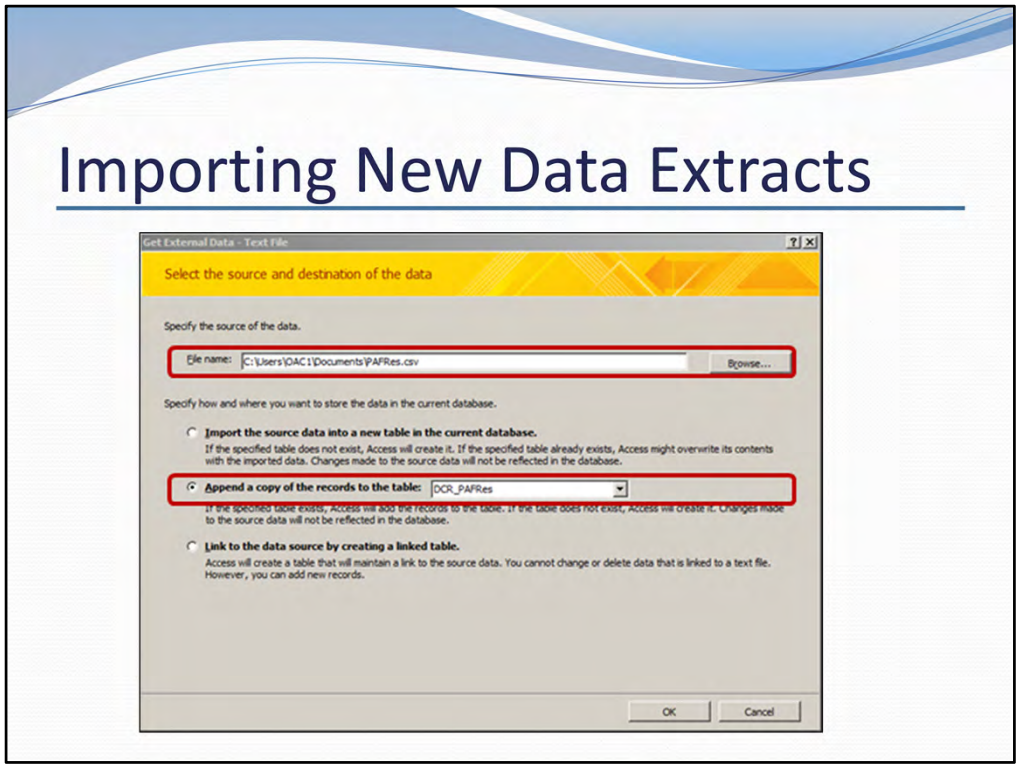
Note: Existing data must be cleared before using the PLD Templates with new data downloads. If it is desired to use the PLD Templates with both the historic and current sets of downloaded DCR CSV files, then a copy of the PLD Templates file can be made before clearing the historic data such that one file will contain the historic data and the other will be cleared and used to import the current data.



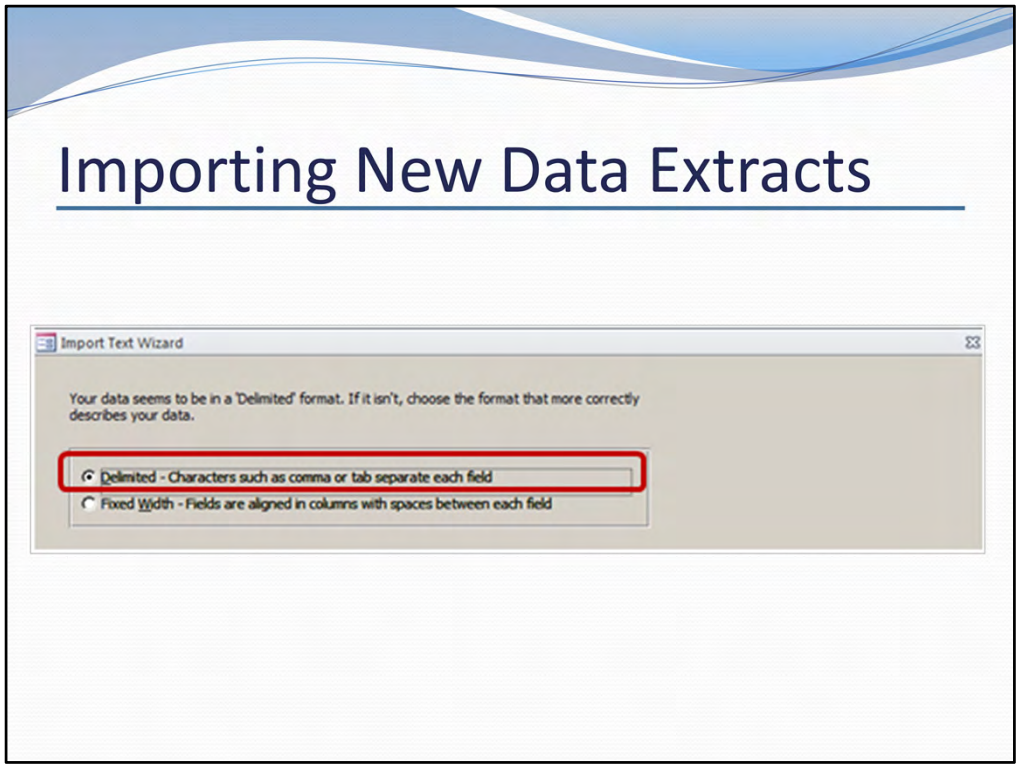
Perform Step 2 to compact and repair the empty PLD Templates. Microsoft Access may close the **Instructions** tab during the compact and repair process. Simply re-open the tab by selecting the **Instructions** button on the front page and continue the data import process.


Importing New Data Extracts
FrontPage
NewData_Instructions
Step 3: Import New Data Files (previously downloaded from the FSP DCR).
As seen in the image below, select the External Data tab above and click on the Text File to invoke the import wizard.
File
Home
External Data
Acrobat
Saved Imports
Linked Table Manager
Excel
Access
ODBC Database
Text File
XML File
More
Import & Link
Saved Exports
Excel
Text File
XML File
PDF or XPS
E-mail
Access
Word Merge
More
Export
Create E-mail
Manage Replies
Collect Data
FrontPage
Partner-Level Complete Data Templates
As seen in the image below, select Browse to locate the PAF-Residential file on your drive/network. Select to append the data to the existing [DCR_PAFRes] table from the drop-down menu. Select OK.
Select the source and destination of the data
Specify the source of the data.
File name:
Browse...
Specify how and where you want to store the data in the current database.
Import the source data into a new table in the current database.

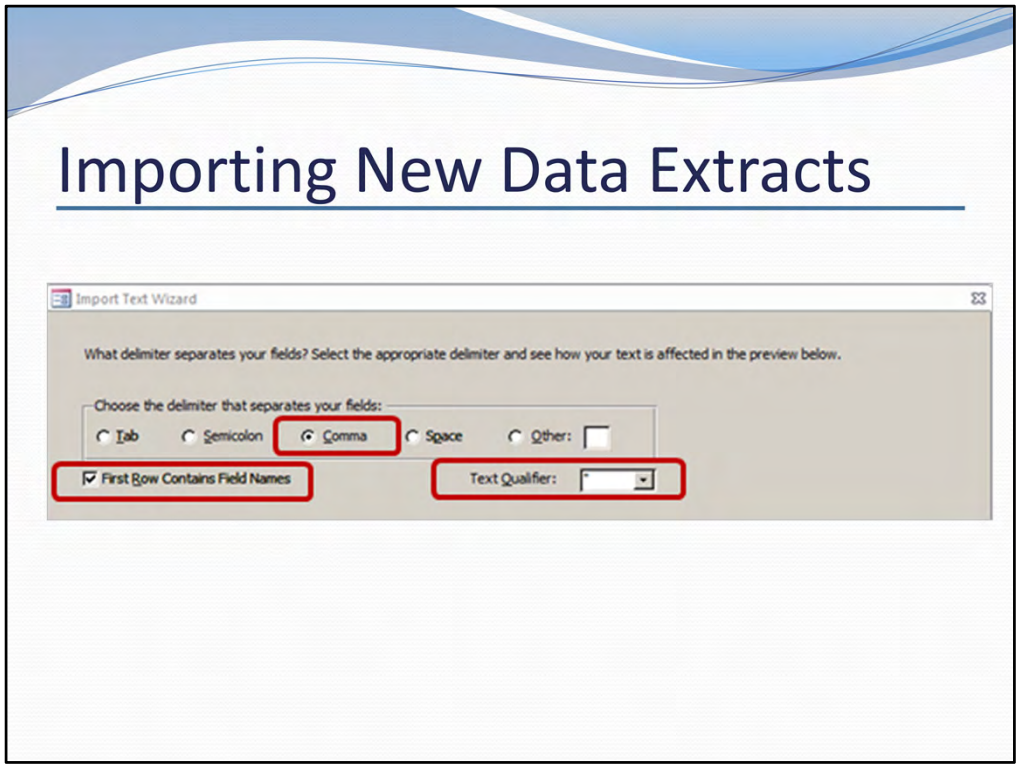
Perform Step 3 to import the current data files of FSP DCR data. Select from the menu **External Data** and then **Text File** in the **Import & Link** section.


Importing New Data Extracts
Get External Data - Text File
Select the source and destination of the data
Specify the source of the data.
File name:
C:\Users\DAC1\Documents\PAFRes.csv
Browse...
Specify how and where you want to store the data in the current database.
Import the source data into a new table in the current database.
If the specified table does not exist, Access will create it. If the specified table already exists, Access might overwrite its contents with the imported data. Changes made to the source data will not be reflected in the database.
Append a copy of the records to the table:
DCR_PAFRes
Link to the data source by creating a linked table.
Access will create a table that will maintain a link to the source data. You cannot change or delete data that is linked to a text file. However, you can add new records.
OK
Cancel

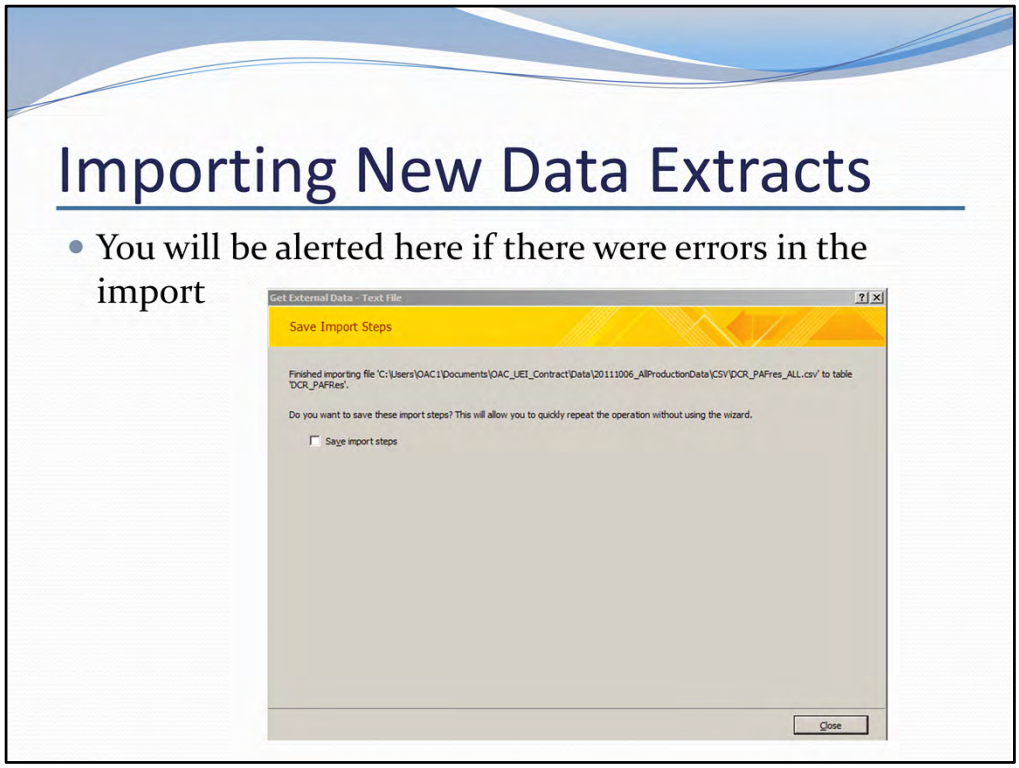
As seen in this slide, select **Browse** to locate the PAF-Residential file you downloaded from ITWS to your drive/network. Select to append the data to the existing **[DCR_PAFRes]** table from the drop-down menu. Select **OK**.


Importing New Data Extracts
Import Text Wizard
Your data seems to be in a 'Delimited' format. If it isn't, choose the format that more correctly describes your data.
Delimited - Characters such as comma or tab separate each field
Fixed Width - Fields are aligned in columns with spaces between each field

As seen in this slide, select the **Delimited** toggle in the following screen. Select **Next**.


Importing New Data Extracts
Import Text Wizard
What delimiter separates your fields? Select the appropriate delimiter and see how your text is affected in the preview below.
Choose the delimiter that separates your fields:
Tab
Semicolon
Comma
Space
Other:
First Row Contains Field Names
Text Qualifier:

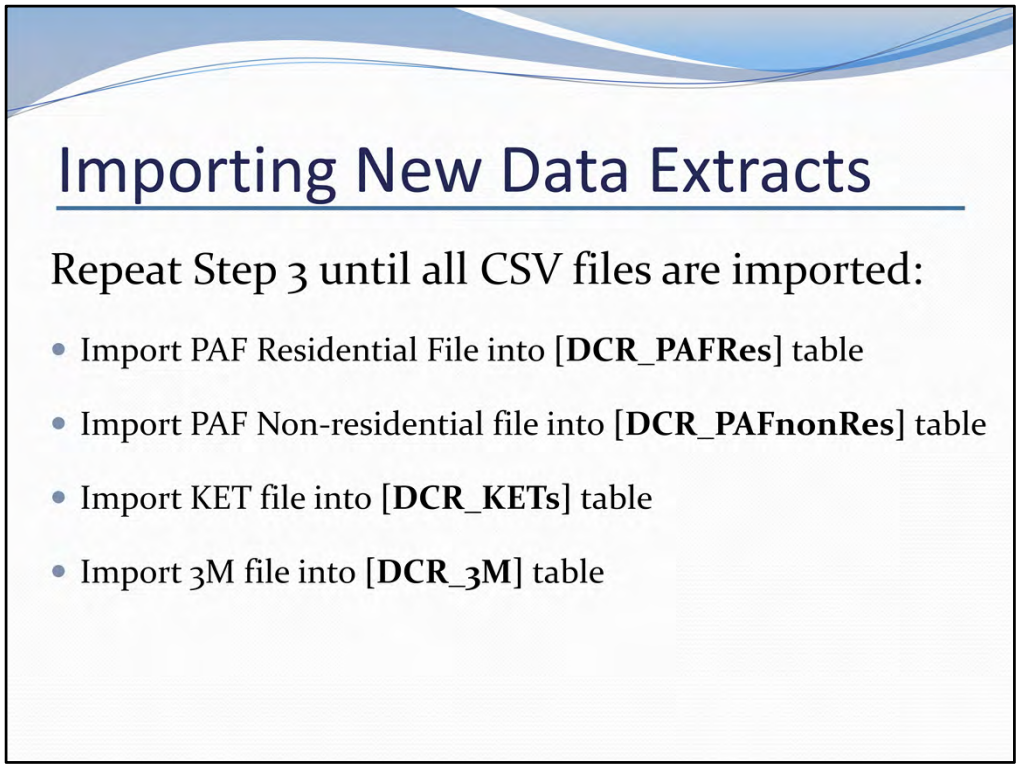
As seen in this slide, select the **Comma** radio button, check the **First Row Contains Field Names** box, and set the **Text Qualifier** to the quotes symbol. Select **Finish**.


Importing New Data Extracts
You will be alerted here if there were errors in the import
Get External Data - Text File
Save Import Steps
Finished importing file 'C:\Users\OAC1\Documents\OAC_UEI_Contract\Data\20111006_AllProductionData\CSV\DCR_PAFres_ALL.csv' to table 'DCR_PAFRes'.
Do you want to save these import steps? This will allow you to quickly repeat the operation without using the wizard.
Save import steps
Close

As seen in this slide, after each file is imported, a pop-up screen will alert you that the process is complete. The pop-up screen will also alert you if any errors were present in the import. Any errors from the data import will be saved in a table noted on the pop-up screen. (It is not necessary to save import steps.)

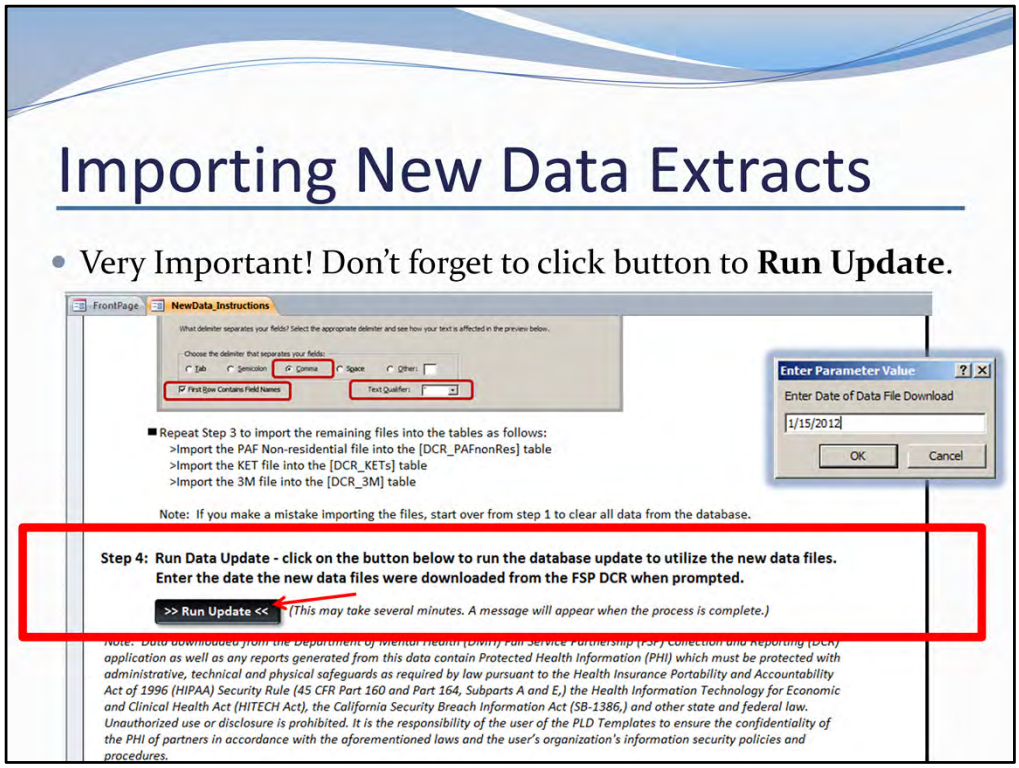
Note: The “CreatedDate” from the 3M CSV file may be corrupt in the FSP DCR data downloaded file. Although all of the other fields will import correctly, the “CreatedDate” field may not import with each 3M record. **This is okay and it will not affect the use of the PLD Templates.** If this occurs, the pop-up screen will alert you that there were errors on import, and the table of errors can be reviewed. A review of the table of errors will show that the only field with error was the “CreatedDate” field because of a “Type Conversion Failure”.

Errors that occur during data import can be reviewed in the Microsoft Access table generated from the import process. Refer to the PLD Templates User Manual (completed 1/19/2012) at Chapter 2 at the section “Reviewing Data Import Errors” beginning on page 19 for step-by-step instructions.


Importing New Data Extracts
Repeat Step 3 until all CSV files are imported:
Import PAF Residential File into [DCR_PAFRes] table
Import PAF Non-residential file into [DCR_PAFnonRes] table
Import KET file into [DCR_KETs] table
Import 3M file into [DCR_3M] table

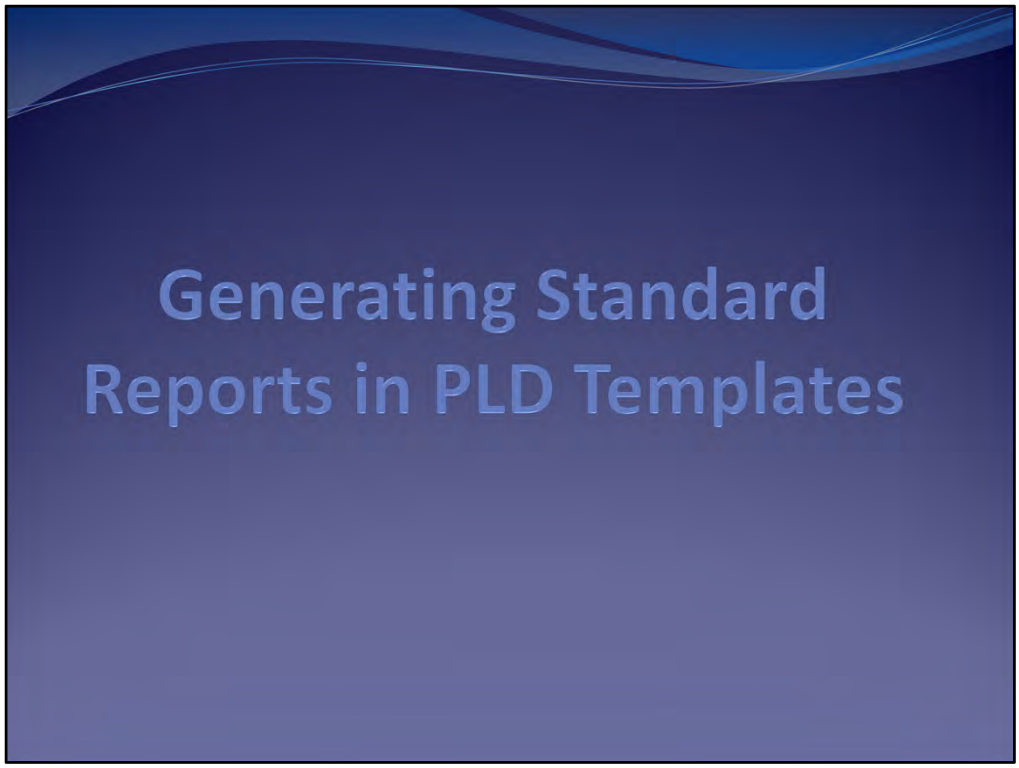
Step 3 will be repeated until all four CSV files have been uploaded into the appropriate tables in the PLD Templates:

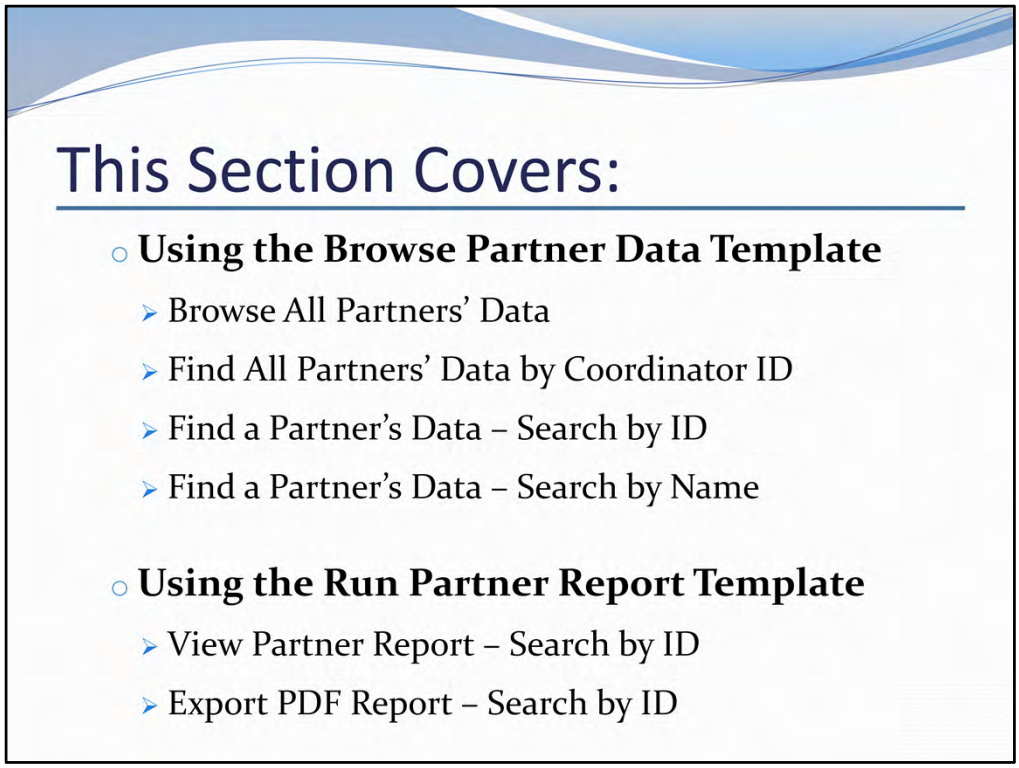
- Import the PAF Residential File into the [DCR_PAFRes] table
- Import the PAF Non-residential file into the [DCR_PAFnonRes] table
- Import the KET file into the [DCR_KETs] table
- Import the 3M file into the [DCR_3M] table


Importing New Data Extracts
Very Important! Don't forget to click button to Run Update.
FrontPage
NewData_Instructions
Enter Parameter Value
Enter Date of Data File Download
1/15/2012
OK
Cancel
Repeat Step 3 to import the remaining files into the tables as follows:
>Import the PAF Non-residential file into the [DCR_PAFnonRes] table
>Import the KET file into the [DCR_KETs] table
>Import the 3M file into the [DCR_3M] table
Note: If you make a mistake importing the files, start over from step 1 to clear all data from the database.
Step 4: Run Data Update - click on the button below to run the database update to utilize the new data files.
Enter the date the new data files were downloaded from the FSP DCR when prompted.
>> Run Update <<
(This may take several minutes. A message will appear when the process is complete.)
application as well as any reports generated from this data contain Protected Health Information (PHI) which must be protected with
administrative, technical and physical safeguards as required by law pursuant to the Health Insurance Portability and Accountability
Act of 1996 (HIPAA) Security Rule (45 CFR Part 160 and Part 164, Subparts A and E,) the Health Information Technology for Economic
and Clinical Health Act (HITECH Act), the California Security Breach Information Act (SB-1386,) and other state and federal law.
Unauthorized use or disclosure is prohibited. It is the responsibility of the user of the PLD Templates to ensure the confidentiality of
the PHI of partners in accordance with the aforementioned laws and the user's organization's information security policies and
procedures.

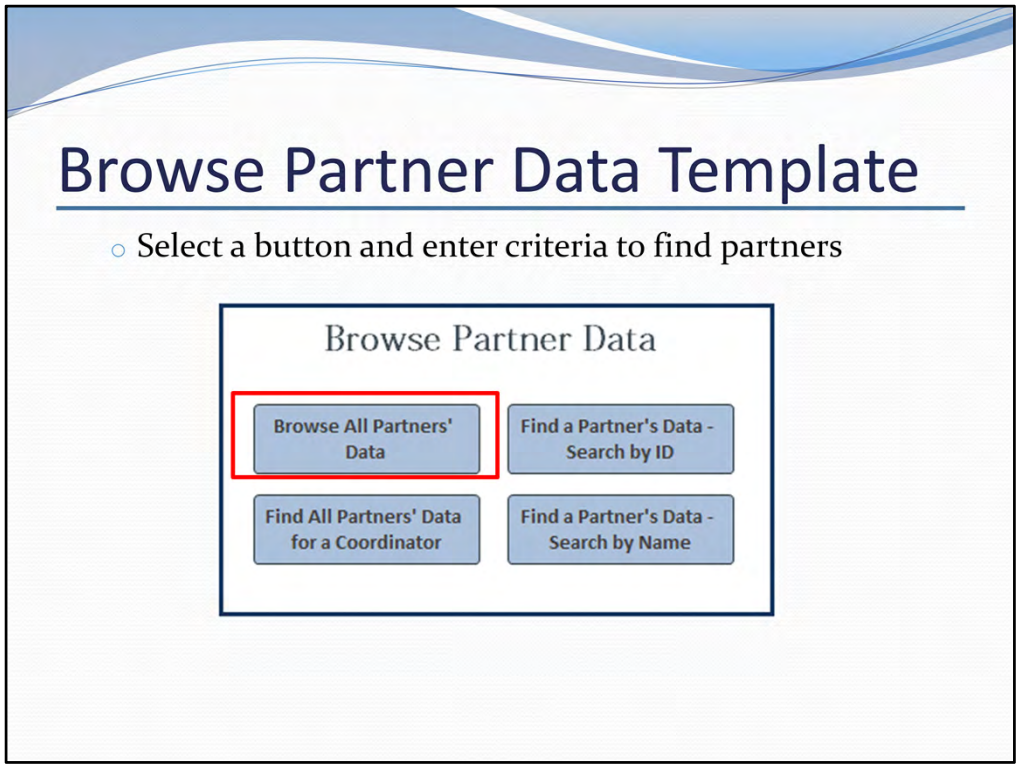
Perform Step 4 by selecting the **[>> Run Update <<]** button. This will run a macro which will make the data available to the templates. When prompted, enter the date the data was downloaded from the DCR or the date to which the data represents current information for the partner and select **OK**.

Note: The new data will not be available for viewing through the PLD Templates until the **[>> Run Update <<]** macro is run. The macro generates the necessary temporary tables based on a series of Microsoft Access queries.


Generating Standard
Reports in PLD Templates

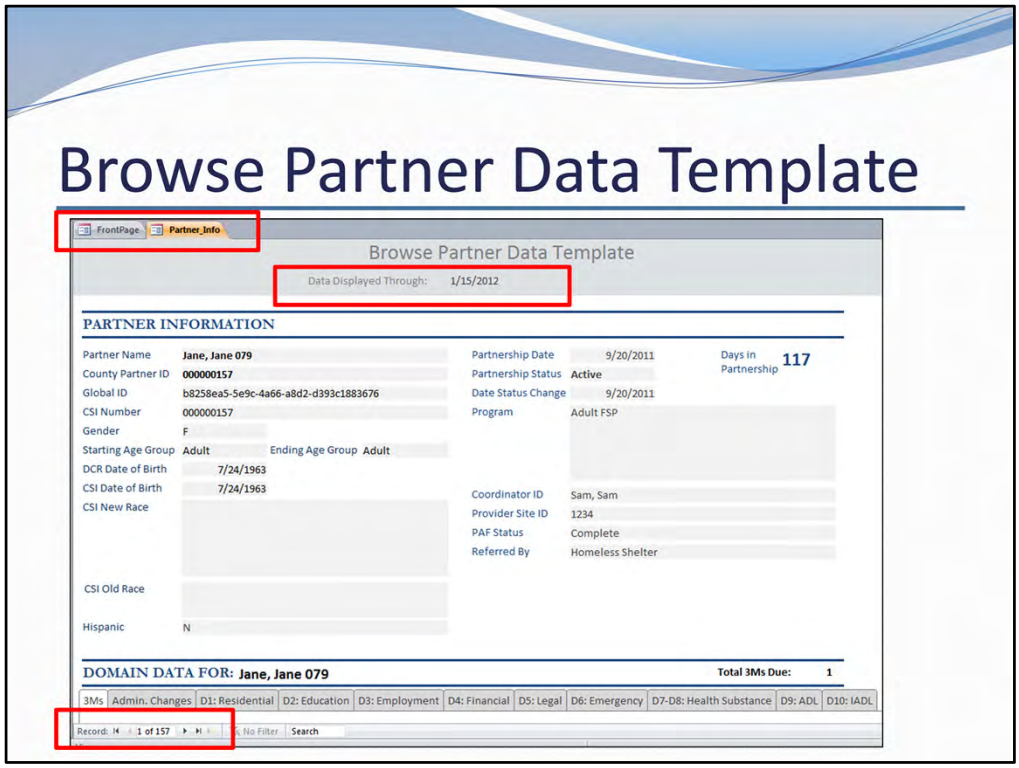

This Section Covers:
Using the Browse Partner Data Template
Browse All Partners' Data
Find All Partners' Data by Coordinator ID
Find a Partner's Data – Search by ID
Find a Partner's Data – Search by Name
Using the Run Partner Report Template
View Partner Report – Search by ID
Export PDF Report – Search by ID

This section covers the utility and features of the Browse Partner Data and the Run Partner Report Templates.


Browse Partner Data Template
Select a button and enter criteria to find partners
Browse Partner Data
Browse All Partners' Data
Find a Partner's Data - Search by ID
Find All Partners' Data for a Coordinator
Find a Partner's Data - Search by Name

The BPD template includes several options to browse partners' data, which can be accessed through the four buttons in the "Browse Partner Data" section of the front page as seen in this slide. You can browse through all partners' partnership data or search by partner ID, partner name or coordinator ID.

Selecting any of the four buttons and entering appropriate criteria when required will display the BPD template. The Browse All Partners' Data requires no criteria and will display every partner.



After opening the BPD template, notice that in Microsoft Access 2010, by default, the template opens as another tab in the application. At the top of the BPD template, the **"Data Displayed Through:"** date signifies the last time the data in the PLD templates was updated from FSP DCR data file downloads. This is the date which was entered when selecting the **Run Update** button from the import page. It is also the date to which the number of active days in partnership is calculated for partnerships which are still active. Under the subheading of **"Partner Information"**, the first partnership's partner information will be displayed.

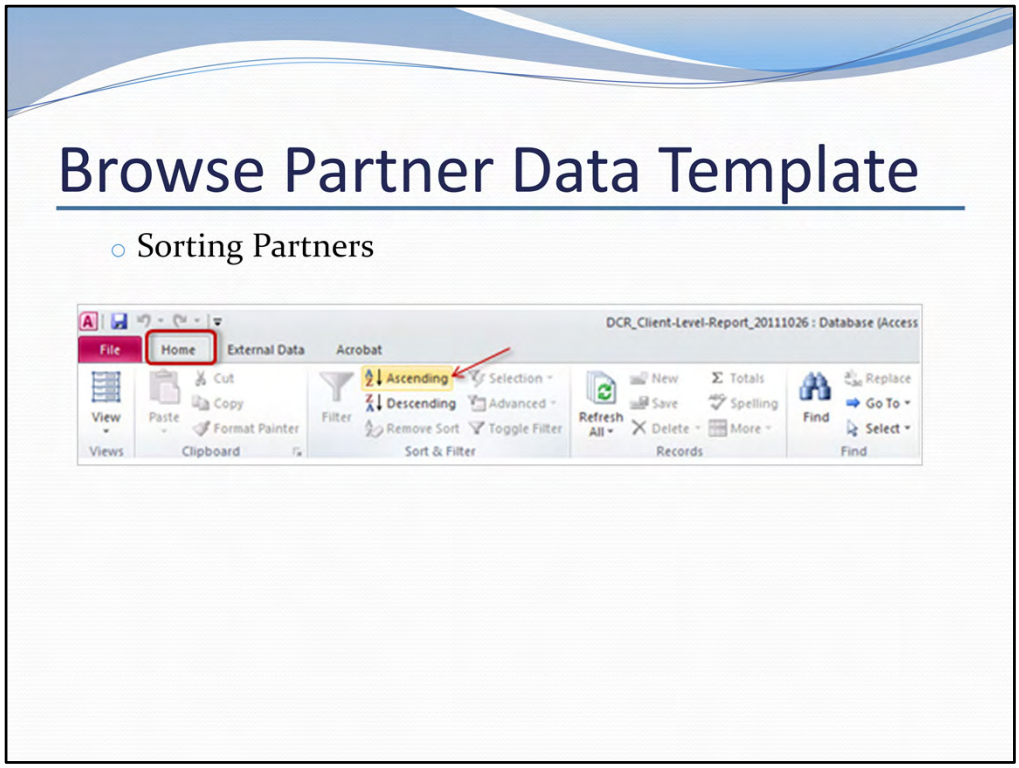
In this slide, the example partnership was still active and had existed for 117 days at the time of data download on 1/15/2012.

There may be many partnerships available to browse. The total amount of partnerships and the current order of the partnership being viewed are displayed at the bottom left-hand corner of the report in the **Record** navigation box. As seen in this slide, the first of 157 total partnerships is displayed in this example.

You can navigate to the next or previous partnership by clicking on the arrows to the left and right of the **Record** navigation box. Additionally, you can locate a partnership in a specific order by clicking on the **Record** navigation box and manually typing in a number within the range of the available partnership count and pressing **Enter**. The form will jump to the partnership associated with that order number. This may be useful when the partnerships are sorted in the form by a specific order. By default, the partnerships are

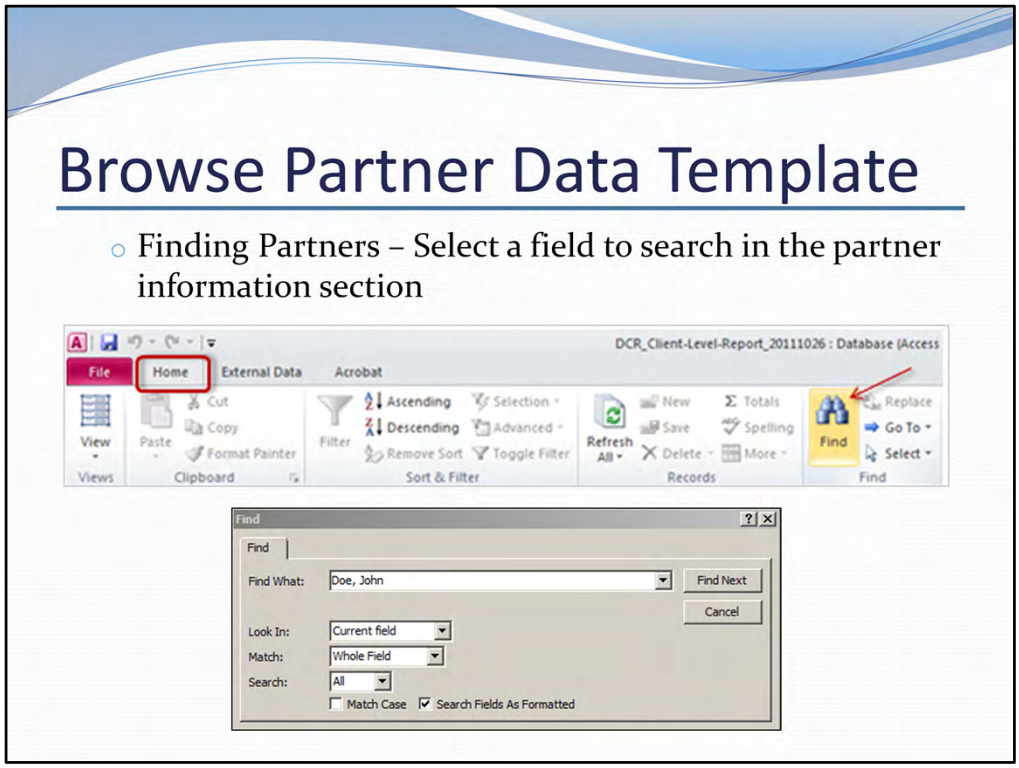
sorted by partnership status and partnership date, such that the active partnerships with the most recent partnership dates appear first. However, the partnerships can be sorted by other fields in the template.

Refer to the PLD Templates User Manual (completed 1/19/2012) at Chapter 3 “The Browse Partner Data (BPD) Template” beginning on page 22 for step-by-step instructions of scrolling through partners in the BPD Template.



As mentioned, the partnerships are sorted by partnership status and partnership date by default, such that the active partnerships with the most recent partnership dates appear first. However, the partnerships can be sorted by other fields in the template.

To sort the order of the partnerships in a different order, place your cursor in the field in the "Partner Information" section of the BPD template which you would like to use to sort the partnerships (e.g., Age Group). As seen in this slide, select the **Home** menu and select either the **Ascending** or **Descending** button to sort the partnerships by the selected field.



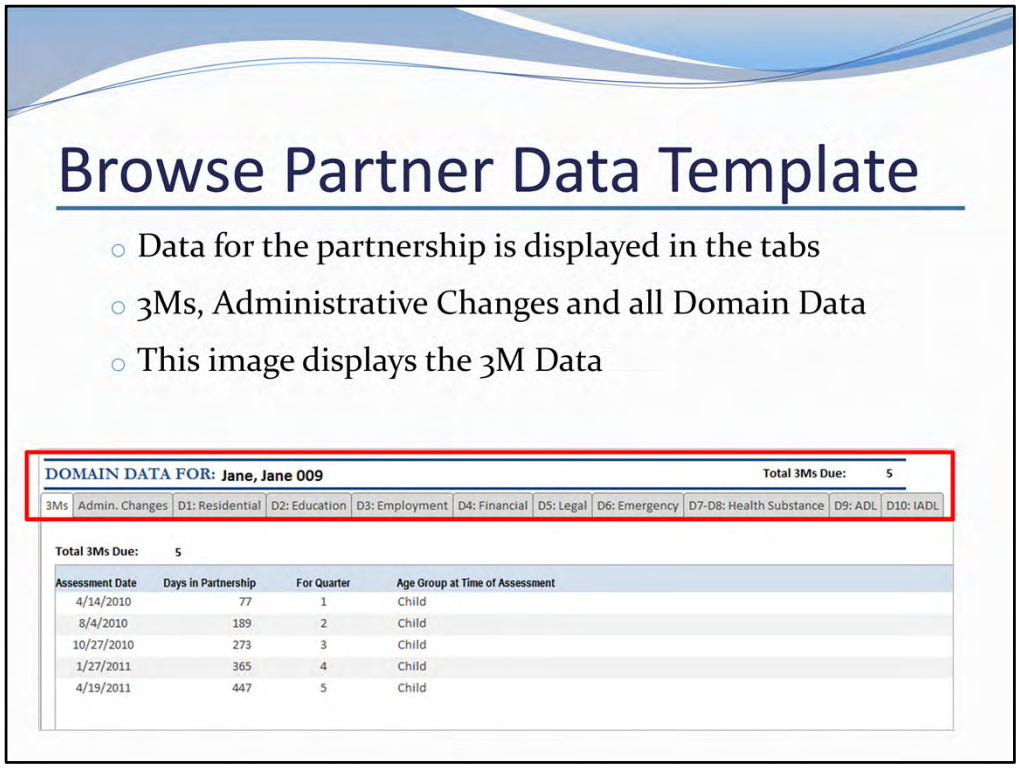
To find a particular partner, place your cursor in the field in the **"Partner Information"** section of the BPD template which you would like to use to find a partnership (e.g., Partner Name).

As seen in this slide, select the **Home** menu and then select the **Find** button.

As seen in this slide, enter the criteria for the search. In this example, we are searching the partner name field to find a specific partner by name.

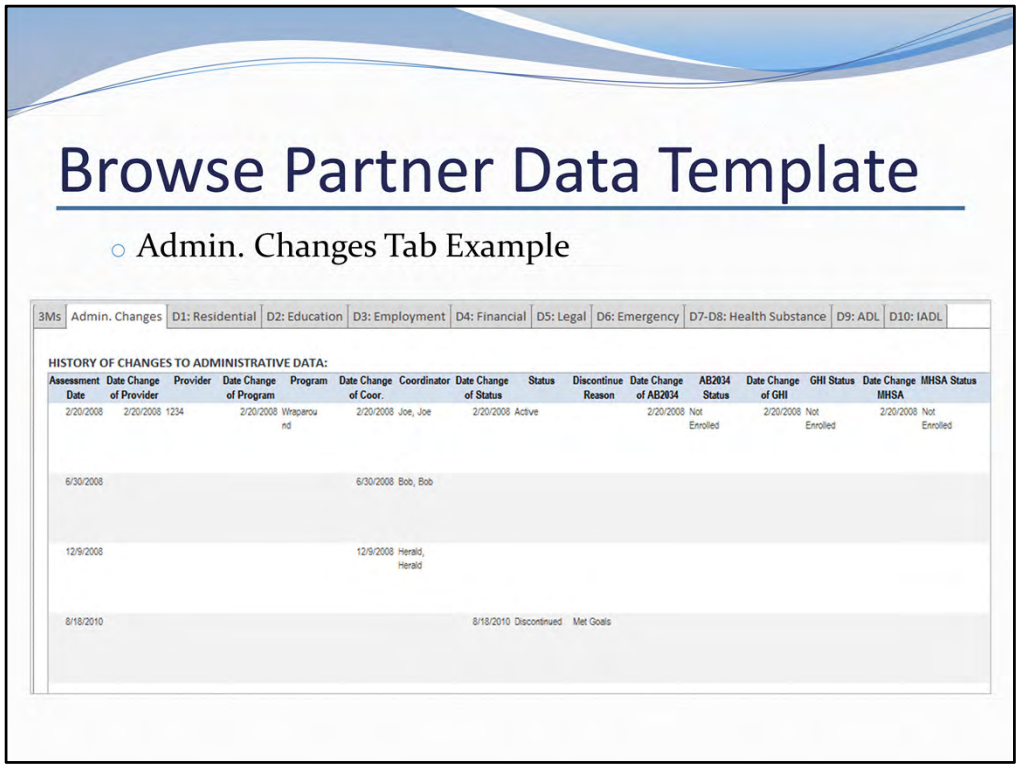
The **Find** box will remain open, and you can select the **Find Next** button to jump to the next partnership with matching search criteria.

Note: Selecting to search information under the **"Domain Data For"** sections in the lower half of the BPD template will only search for data within the partnership which is currently being displayed. The search will not bring up other partnership's matching data.



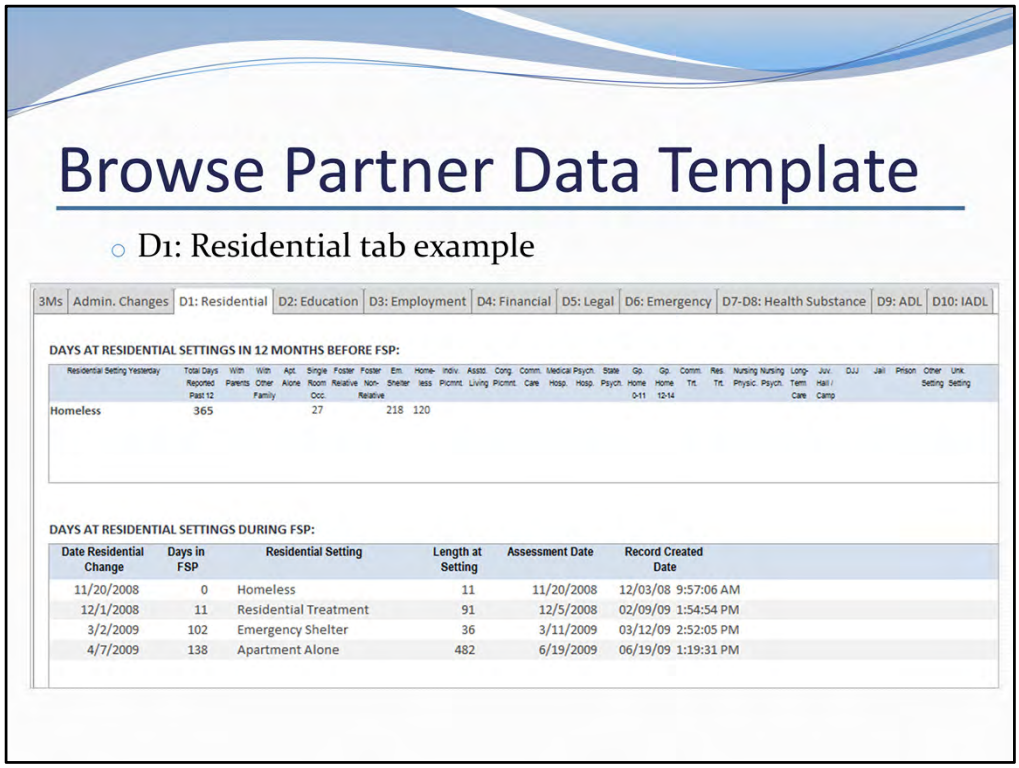
Under the **"Domain Data For"** subheading, there are tabs for the partnership's information such as their legal, financial and employment data. All domain options are displayed in this slide. Data associated with a tab will be displayed by clicking on the tab. A vertical scroll bar will appear if necessary to allow scrolling within the table embedded in the tab.

In this example, the partner had five 3Ms due, and all five 3Ms were completed.



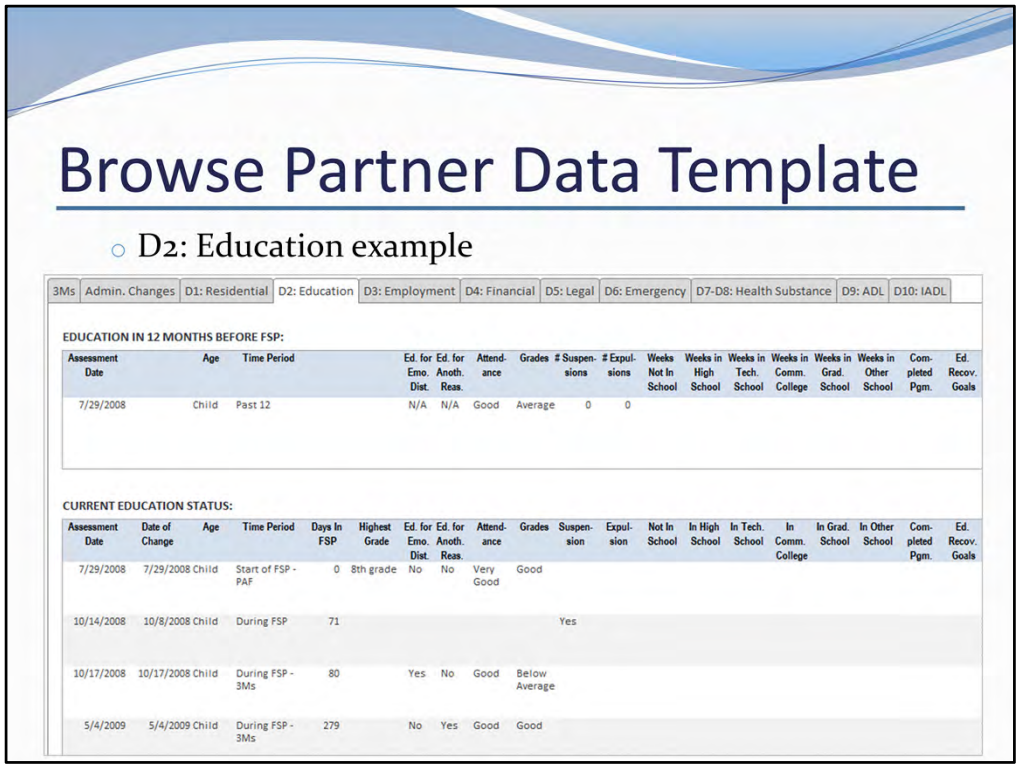
The **Admin. Changes** tab displays a list of all administrative changes reported for the partnership, including assessment date and dates of change.

In this example, the partnership began on 2/20/2008 and changed coordinators from Joe to Bob to Herald. The partnership was discontinued on 8/18/2010 for having met goals.



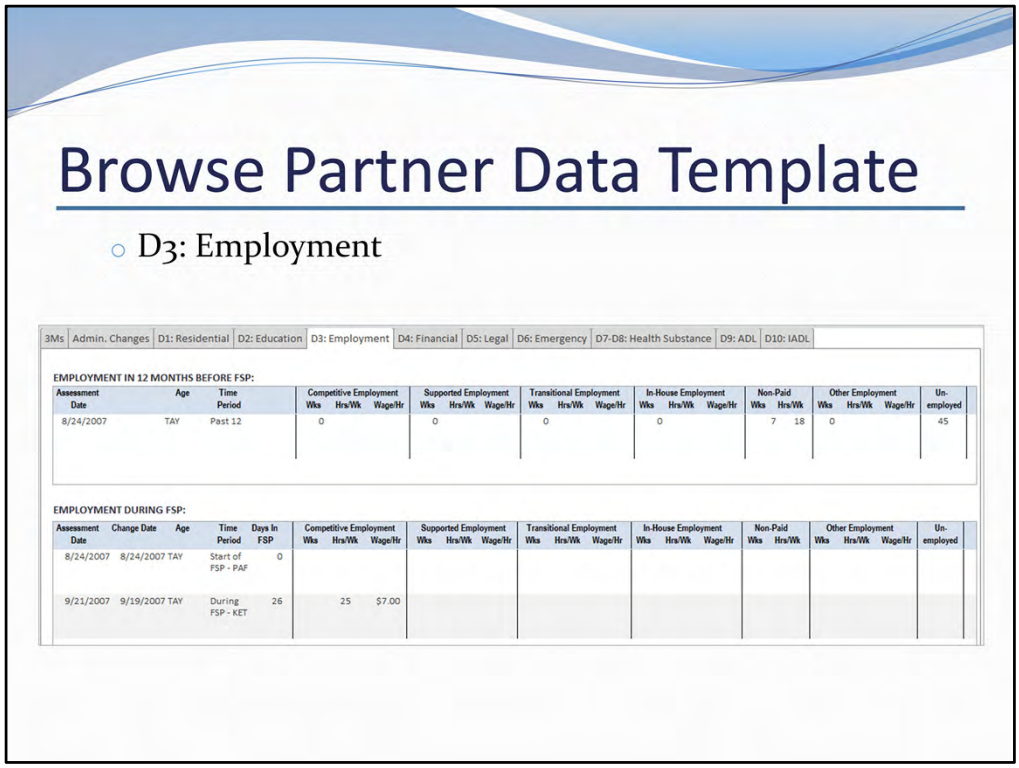
The **D1: Residential** tab displays the past 12 months of residential information and a list of all residential status changes during the program.

In this example, the partner spent 218 days and 120 days in emergency shelter and homeless, respectively, in the 12 months before the partnership. During the partnership, the partner spent 11 days homeless, 91 days in residential treatment, 36 days in an emergency shelter, and spent the final 482 days in an apartment alone.



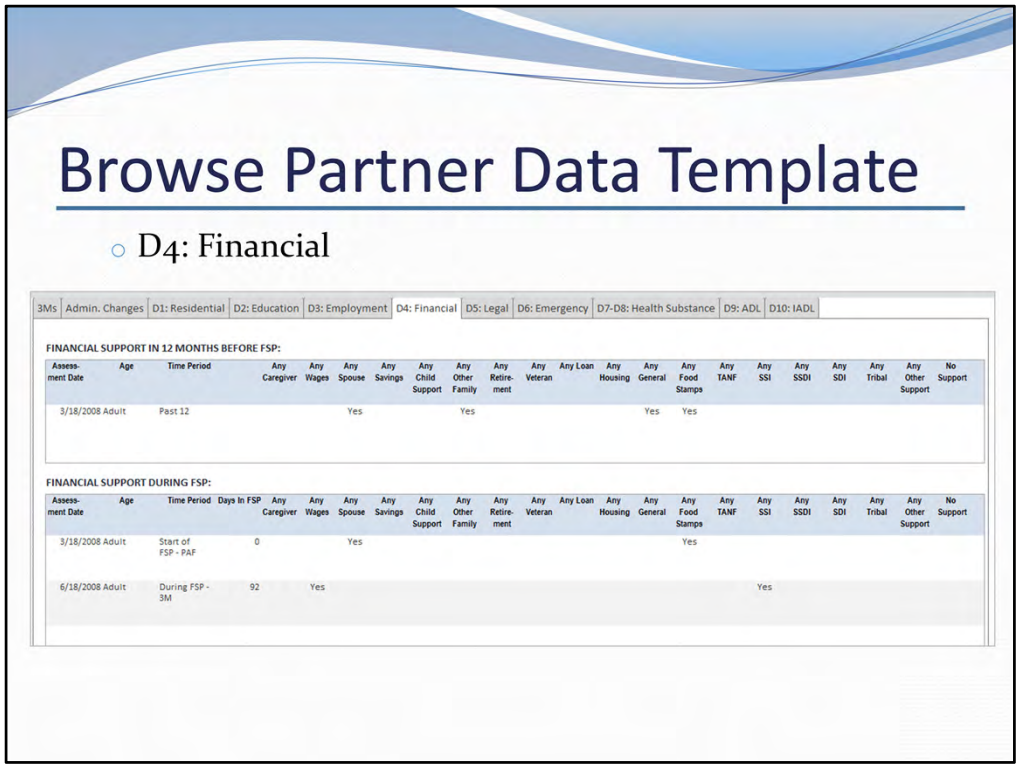
The **D2: Education** tab displays the past 12 months of education information and a list of all education KET and 3M assessments during the program.

In this example, the partner entered the FSP in 8th grade with very good grades. The partner had average grades during the previous year. The partner was suspended after 71 days in the partnership as reported on a KET, and the partner's grades were below average at the first 3M assessment at day 80 of the partnership. The next 3M assessment submitted was at 279 days into the partnership, and the partner's grades were good.



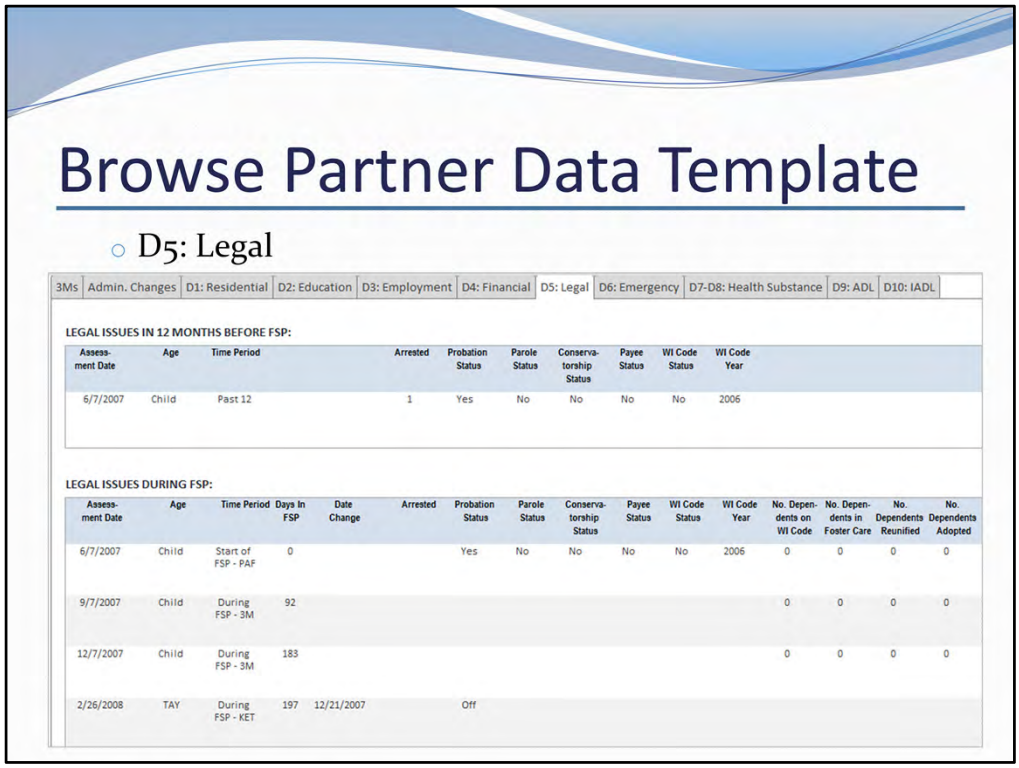
The **D3: Employment** tab displays the past 12 months of employment information and a list of all employment KET assessments during the program.

In this example, the partner was unemployed for 45 of 52 weeks in the past 12 months and spent 7 weeks in non-paid employment for 18 hours per week. On day 26 in the FSP, a KET assessment reported that the partner began work at 25 hours a week for $7.00 per hour.



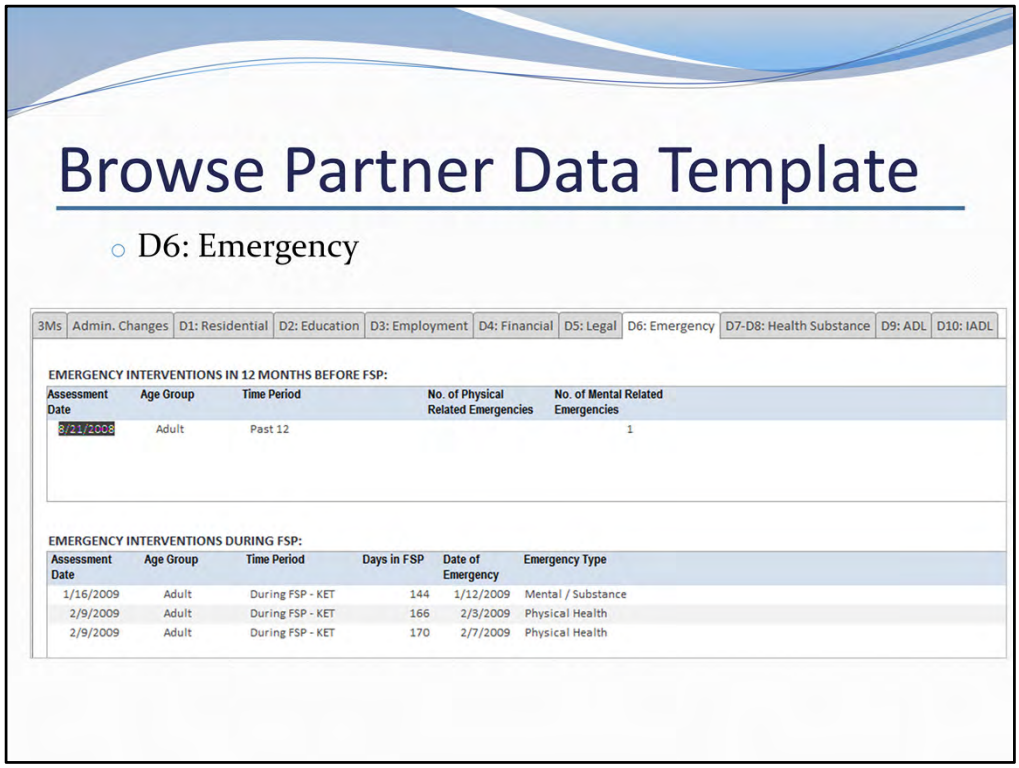
The **D4: Financial** tab displays the past 12 months of financial support information and a list of all financial support 3M assessments during the program.

In this example, the partner had financial support in the form of spouse, general and food stamps in the 12 months before the FSP. At the start of the FSP, the partner was receiving financial support from spouse and food stamps. At the second 3M assessment, the partner reported financial support from wages and SSI.



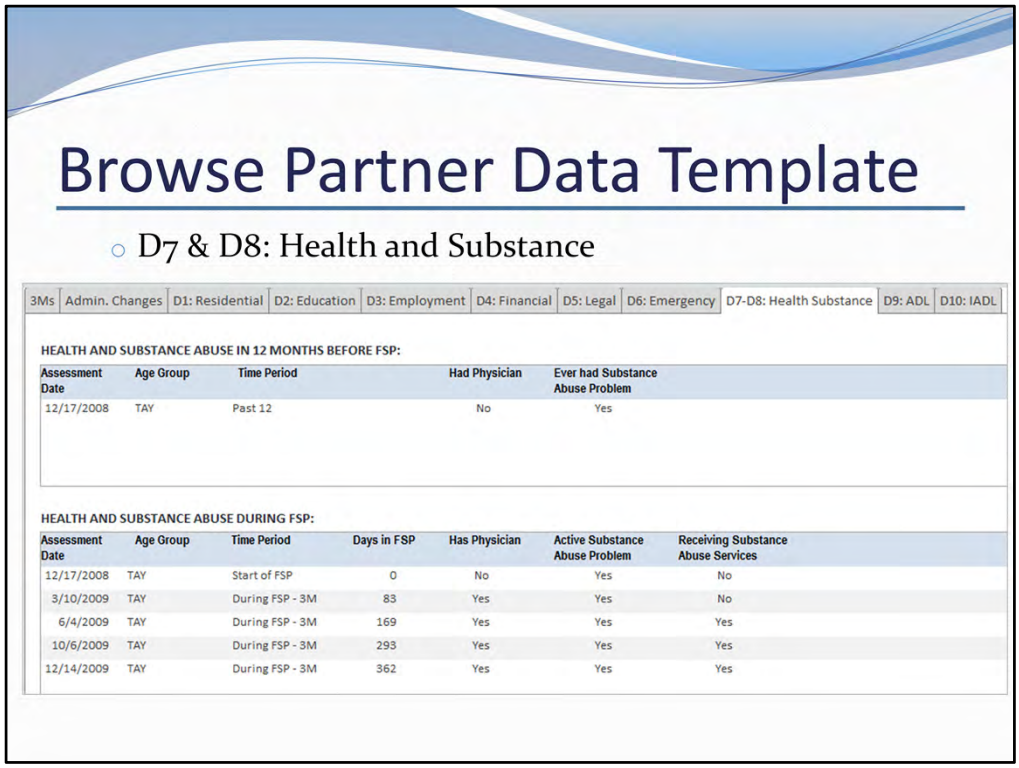
The **D5: Legal** tab displays the past 12 months of legal issues and a list of all KET and 3M assessment legal issues during the program.

In this example, the partner was arrested one time in the 12 months before partnership and was on probation upon entering the FSP. No changes were reported on the first two 3M assessments. On day 197 in the FSP, a KET assessment reported that the partner went off probation.



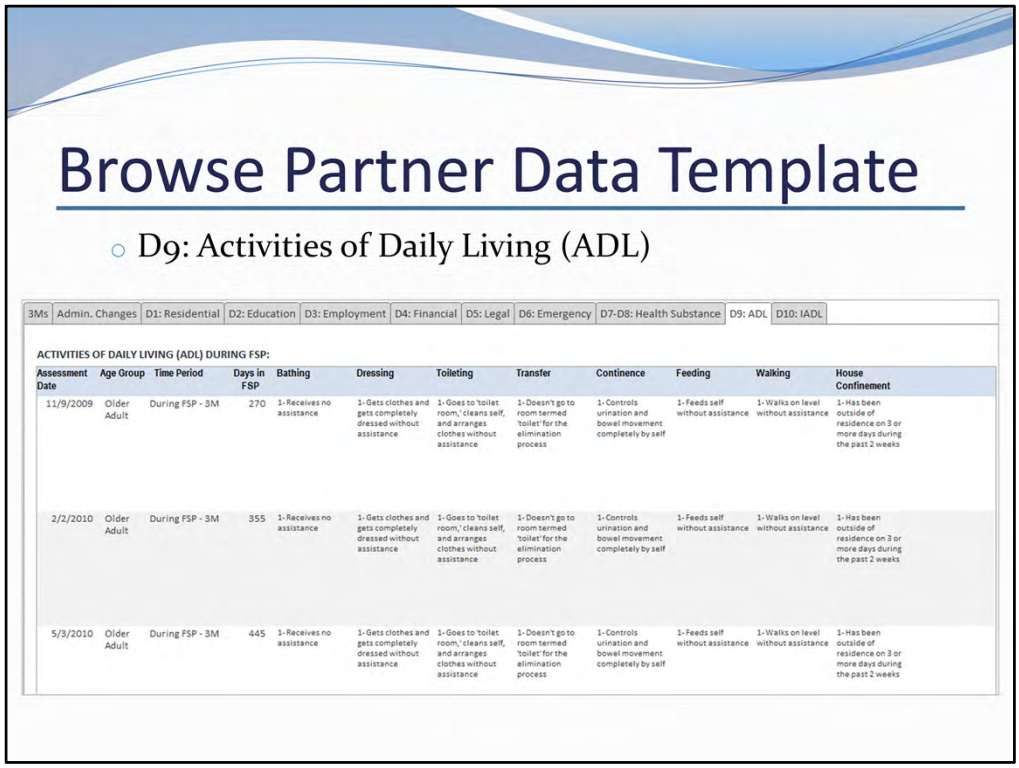
The **D6: Emergency** tab displays the past 12 months of emergency interventions and a list of all emergency intervention KET assessments during the program.

In this example, the partner reported one mental/substance related emergency in the 12 months before the partnership. During the partnership, the partner had a mental/substance related emergency at 144 days in the partnership, and the partner had physical health emergencies on days 166 and 170 in the partnership.



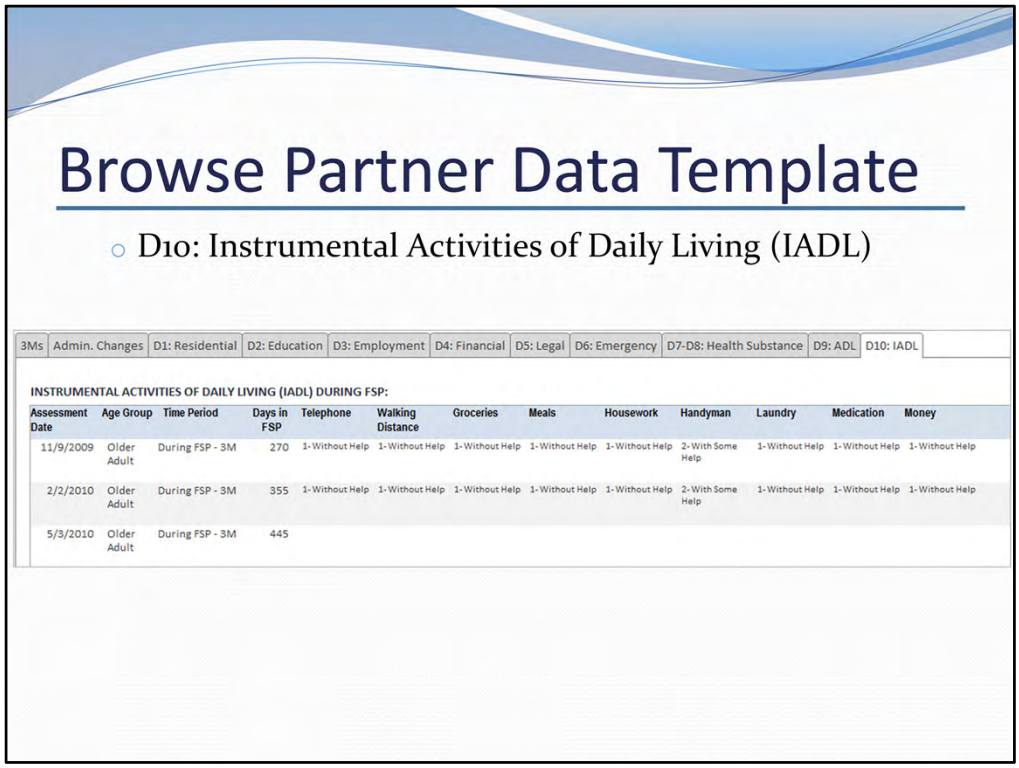
The **D7-D8: Health Substance** tab displays the past 12 months of health and substance abuse history and a list of all health and substance abuse 3M assessments during the program.

In this example, the partner did not have a physician and had a substance abuse problem in the 12 months before and at the start of the FSP. The partner was not receiving substance abuse services at the start of the FSP. At the first 3M assessment on day 83, the partner reported having a physician. At the second 3M assessment on day 169, the partner reported receiving substance abuse services.


Browse Partner Data Template
D9: Activities of Daily Living (ADL)
3Ms
Admin. Changes
D1: Residential
D2: Education
D3: Employment
D4: Financial
D5: Legal
D6: Emergency
D7-D8: Health Substance
D9: ADL
D10: IADL
ACTIVITIES OF DAILY LIVING (ADL) DURING FSP:
Assessment Date
Age Group
Time Period
Days in FSP
Bathing
Dressing
Toileting
Transfer
Continence
Feeding
Walking
House Confinement
11/9/2009
Older Adult
During FSP - 3M
270
1- Receives no assistance
1- Gets clothes and gets completely dressed without assistance
1- Goes to 'toilet room,' cleans self, and arranges clothes without assistance
1- Doesn't go to room termed 'toilet' for the elimination process
1- Controls urination and bowel movement completely by self
1- Feeds self without assistance
1- Walks on level without assistance
1- Has been outside of residence on 3 or more days during the past 2 weeks
2/2/2010
Older Adult
During FSP - 3M
355
1- Receives no assistance
1- Gets clothes and gets completely dressed without assistance
1- Goes to 'toilet room,' cleans self, and arranges clothes without assistance
1- Doesn't go to room termed 'toilet' for the elimination process
1- Controls urination and bowel movement completely by self
1- Feeds self without assistance
1- Walks on level without assistance
1- Has been outside of residence on 3 or more days during the past 2 weeks
5/3/2010
Older Adult
During FSP - 3M
445
1- Receives no assistance
1- Gets clothes and gets completely dressed without assistance
1- Goes to 'toilet room,' cleans self, and arranges clothes without assistance
1- Doesn't go to room termed 'toilet' for the elimination process
1- Controls urination and bowel movement completely by self
1- Feeds self without assistance
1- Walks on level without assistance
1- Has been outside of residence on 3 or more days during the past 2 weeks

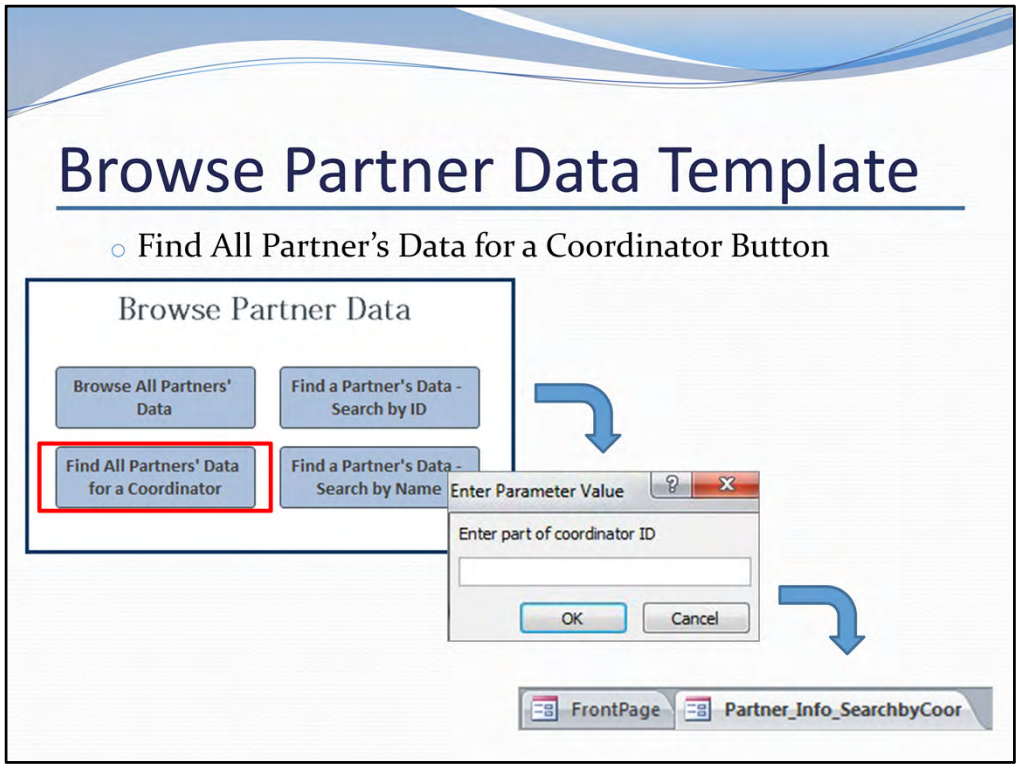
The **D9: ADL** tab displays the ADL 3M assessments for older adults during the program.

In this example, the partner had three 3M assessments during the program, and the ADL status were captured on days 270, 355 and 445 in the program.

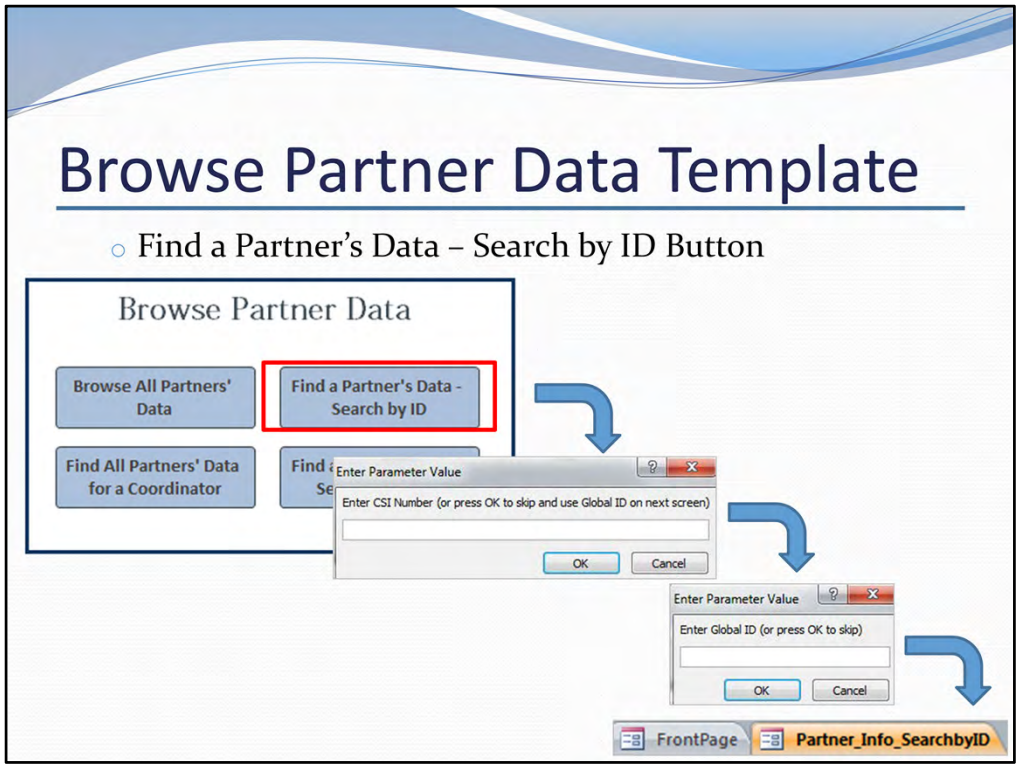


The **D10: IADL** tab displays the IADL 3M assessments for older adults during the program.

In this example, the partner had three 3M assessments during the program, and the IADL status was captured on days 270 and 355. The IADL information was not completed for the 3M assessment on day 445 in the program.


Browse Partner Data Template
Find All Partner's Data for a Coordinator Button
Browse Partner Data
Browse All Partners' Data
Find a Partner's Data - Search by ID
Find All Partners' Data for a Coordinator
Find a Partner's Data - Search by Name
Enter Parameter Value
Enter part of coordinator ID
OK
Cancel
FrontPage
Partner_Info_SearchbyCoor

The **Find All Partner's Data for a Coordinator** will apply a filter to the BPD template based on matching the criteria entered with a coordinator ID. As seen in this slide, selecting this button will bring up the "Enter Parameter Value" pop-up window. Typing in any portion of a coordinator ID in the box will apply the filter to the BPD template. The BPD template will then display only those partnerships with associated coordinator IDs containing the entered text as any consecutive part of the coordinator ID. For example, entering "Smith" in the "Enter Parameter Value" pop-up window will display partnerships for all coordinator IDs with any portion of "Smith" as part of the ID. As seen in this slide, the BPD template will open in a new tab titled **"Partner_Info_SearchbyCoor"** with partnership records that are exclusive to the coordinator ID search performed. The number of partnerships available can be seen in the **Record** box in the lower left-hand corner of the screen.

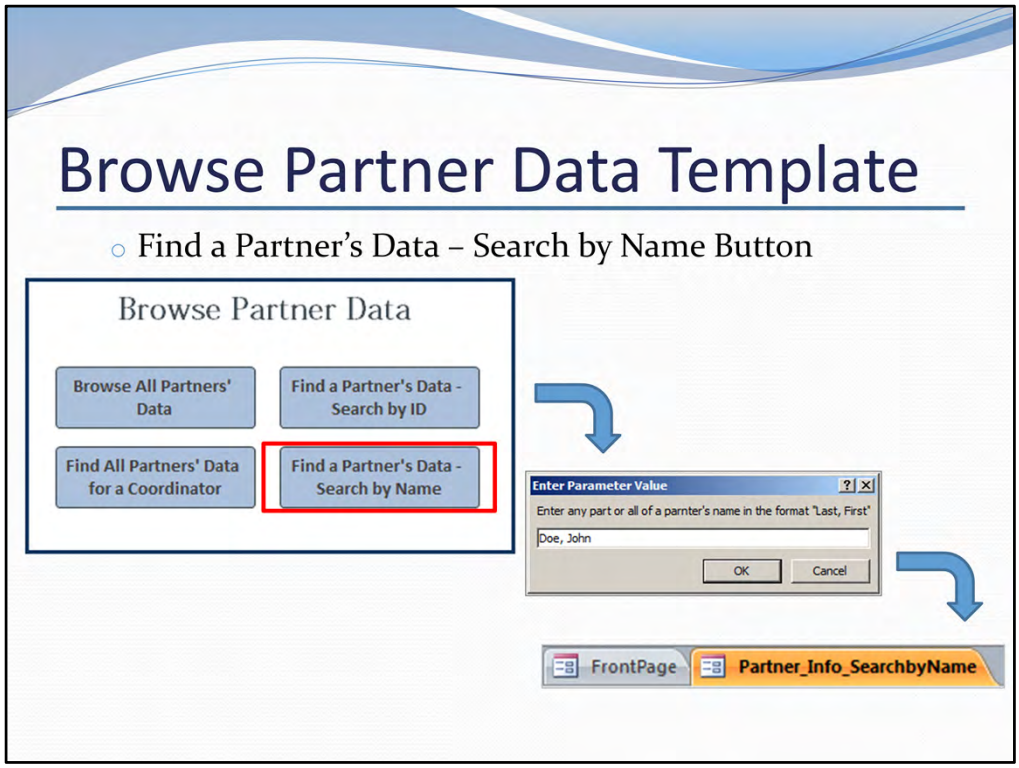

Browse Partner Data Template
Find a Partner's Data – Search by ID Button
Browse Partner Data
Browse All Partners' Data
Find a Partner's Data - Search by ID
Find All Partners' Data for a Coordinator
Enter Parameter Value
Enter CSI Number (or press OK to skip and use Global ID on next screen)
OK
Cancel
Enter Parameter Value
Enter Global ID (or press OK to skip)
OK
Cancel
FrontPage
Partner_Info_SearchbyID

The **Find a Partner's Data – Search by ID** button will apply a filter to the BPD template based on matching the criteria entered with a partner ID. There are two options for entering partner IDs. You can enter a CSI number in the first pop-up window or enter a Global ID in the second window.

To search for a specific partnership by partner ID number, click on the **Find a Partner's Data – Search ID** button under the "Browse Partner Data" heading. As seen in this slide, the first pop-up window that appears will allow you to enter search criteria of CSI number. If known, enter the CSI number and press **OK**. If you would prefer to search by Global ID, enter nothing in this first window and click **OK** to skip the search by CSI number.

As seen in this slide, the second pop-up window that appears will allow you to enter search criteria of Global ID. If a CSI Number was already entered in the previous pop-up window, then click **OK** to skip the search by Global ID. If the CSI Number was not entered, then enter a Global ID for a partnership and press **OK** to continue.

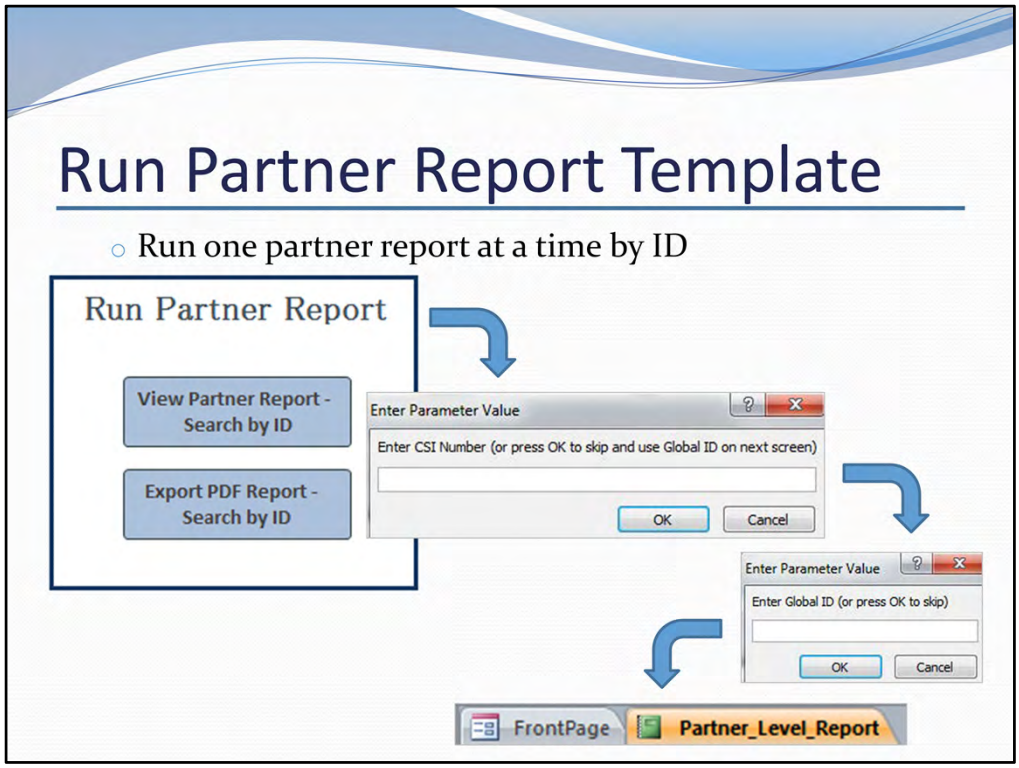
As seen in this slide, the BPD template will open in a new tab titled **"Partner_Info_SearchbyID"** with the partnership information for the partnership matching the partner ID entered into the search box. The number of partnerships for partners with matching IDs is displayed in the **Record** box in the lower left-hand corner of the screen.


Browse Partner Data Template
Find a Partner's Data – Search by Name Button
Browse Partner Data
Browse All Partners' Data
Find a Partner's Data - Search by ID
Find All Partners' Data for a Coordinator
Find a Partner's Data - Search by Name
Enter Parameter Value
Enter any part or all of a parnter's name in the format 'Last, First'
Doe, John
OK
Cancel
FrontPage
Partner_Info_SearchbyName

The **Find a Partner's Data – Search by Name** will apply a filter to the BPD template based on matching the criteria entered with a partner's name.

As seen in this slide, selecting this button will bring up the "Enter Parameter Value" pop-up window. Typing in any portion of a partner's name in the box will apply the filter to the BPD template. The BPD template will then display only those partnerships which contain the entered text as any consecutive part of the partner name. For example, entering "Martin" in the "Enter Parameter Value" pop-up window will display partnership data for all partnerships with any portion of "Martin" as either their first or last name. The standard FSP DCR format for the name field is "Last, First". Therefore, you can conduct a search for a partnership using the full name with that format. As seen in this slide, for example John Doe would be found using "Doe, John".

As seen in this slide, the BPD template will open in a new tab titled **"Partner_Info_SearchbyName"** with partnerships matching the search criteria displayed. The number of partnerships matching the search can be seen in the **Record** box in the lower left-hand corner of the screen.

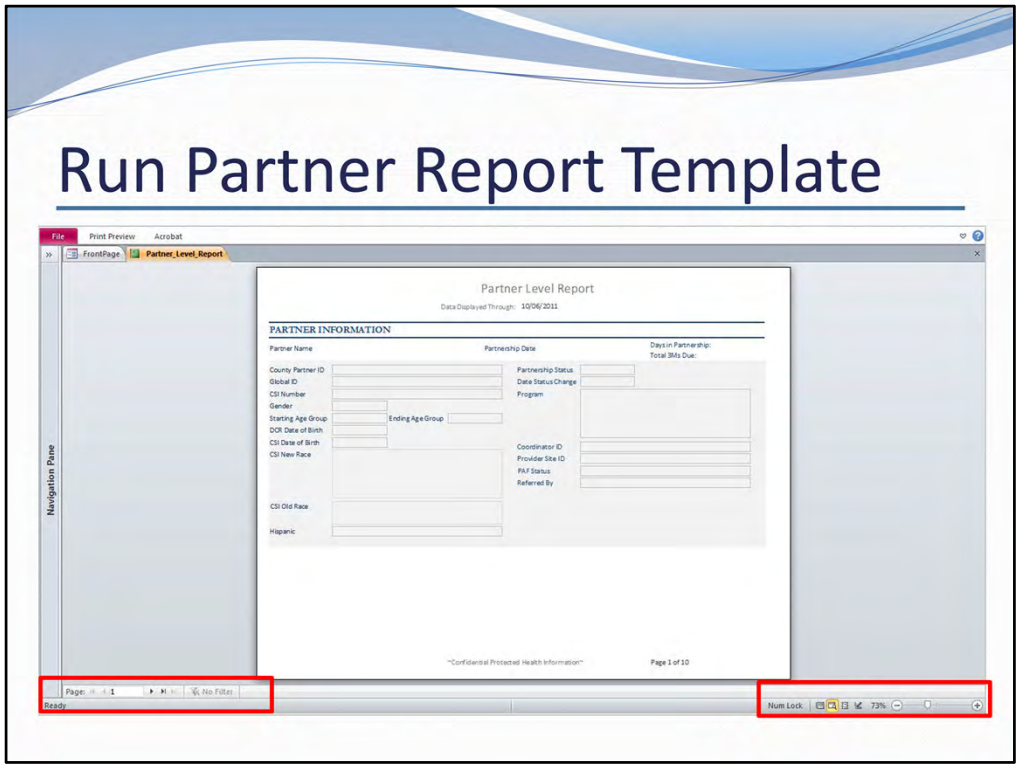

Run Partner Report Template
Run one partner report at a time by ID
Run Partner Report
View Partner Report - Search by ID
Export PDF Report - Search by ID
Enter Parameter Value
Enter CSI Number (or press OK to skip and use Global ID on next screen)
OK
Cancel
Enter Parameter Value
Enter Global ID (or press OK to skip)
OK
Cancel
FrontPage
Partner_Level_Report

The RPR template includes two options to generate a partnership report, which can be accessed through the two buttons in the **"Run Partner Report"** section of the front page as seen in this slide. The RPR Template can be viewed in Microsoft Access as an Access report or it can be exported as a PDF file.

The **View Partner Report – Search by ID** button will display a report within Microsoft Access, which can be viewed electronically or printed from Microsoft Access. A report for a partnership is displayed based on matching the criteria entered for a partner ID. There are two options for entering partner IDs. You can enter a CSI number in the first pop-up window or enter a Global ID in the second pop-up window.

To display a report for a specific partnership, click on the **View Partner Report – Search by ID** button under the **"Run Partner Report"** heading. As seen in this slide, the first pop-up window which appears will allow you to enter search criteria of CSI number. If known, enter the CSI number and press **OK**. If you would prefer to search by Global ID, click **OK** to skip the search by CSI number.

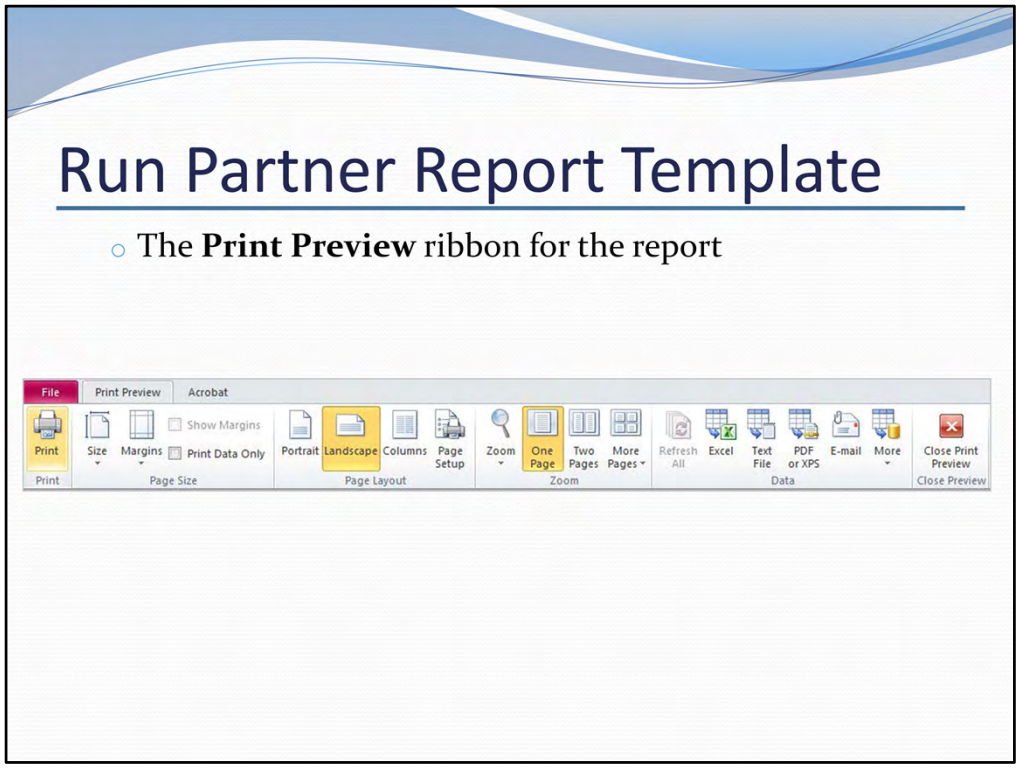
Note: You can use CTRL + V to paste search criteria into the **"Enter Parameter Value"** pop-up windows.



As seen in this slide, the report will open in print preview mode.

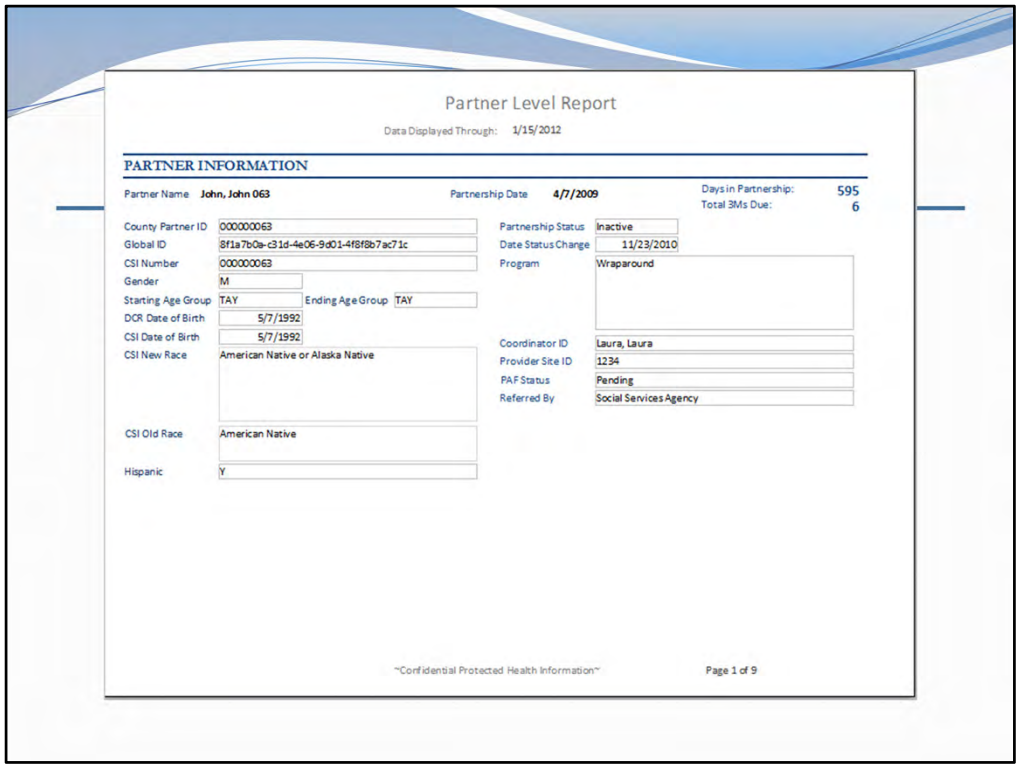
As seen in this slide, the **Page** selector in the lower left-hand corner will allow you to scroll or jump to any page in the report.

As seen in this slide, a zoom slide-bar in the lower right-hand corner allows you to quickly enlarge or shrink the view of the report on the screen.



As seen in this slide, The **Print Preview** ribbon heading has print options. Clicking **Print** will print the partnership report. You can also zoom in or out and view the report by more than one page in the "Zoom" section of the ribbon. The **Close Print Preview** option will exit the partner level report and return you to the front page.

Note: The margins of the partner report are set for printing on standard printers. Adjusting the margins may affect the quality of the report. However, if the report prints extra blank pages on your printer, then slightly adjusting the margins may solve the issue.



Partner Level Report

Data Displayed Through: 1/15/2012

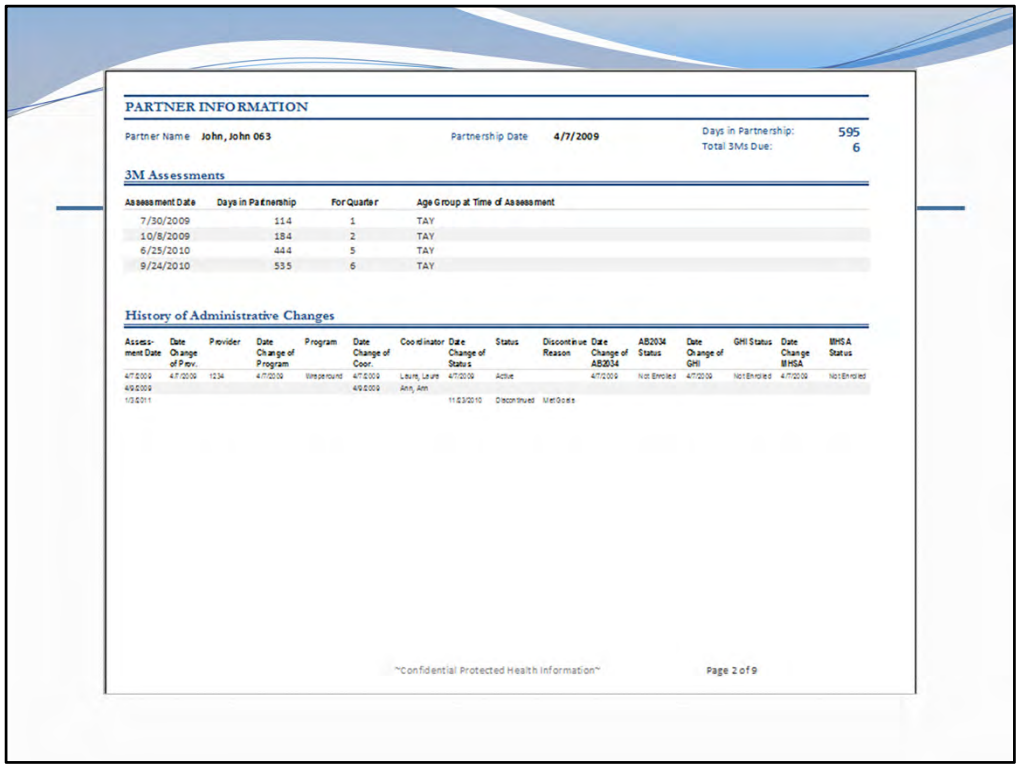
PARTNER INFORMATION

Partner Name John, John 063 | Partnership Date 4/7/2009 | Days in Partnership: 595 | Total 3Ms Due: 6

County Partner ID	000000063	Partnership Status	Inactive
Global ID	8f1a7b0a-c31d-4e06-9d01-4f8f8b7ac71c	Date Status Change	11/23/2010
CSI Number	000000063	Program	Wraparound
Gender	M		
Starting Age Group	TAY	Ending Age Group	TAY
DCR Date of Birth	5/7/1992		
CSI Date of Birth	5/7/1992	Coordinator ID	Laura, Laura
CSI New Race	American Native or Alaska Native	Provider Site ID	1234
		PAF Status	Pending
		Referred By	Social Services Agency
CSI Old Race	American Native		
Hispanic	Y		

~Confidential Protected Health Information~ Page 1 of 9

The first page of a nine page example report is displayed in this slide. At the top of the RPR template, the **"Data Displayed Through:"** date signifies the last time the data in the PLD templates was updated from FSP DCR data file downloads. The bottom right-hand corner of the report will display the page number.



PARTNER INFORMATION

Partner Name John, John 063 Partnership Date 4/7/2009 Days in Partnership: 595
Total 3Ms Due: 6

3M Assessments

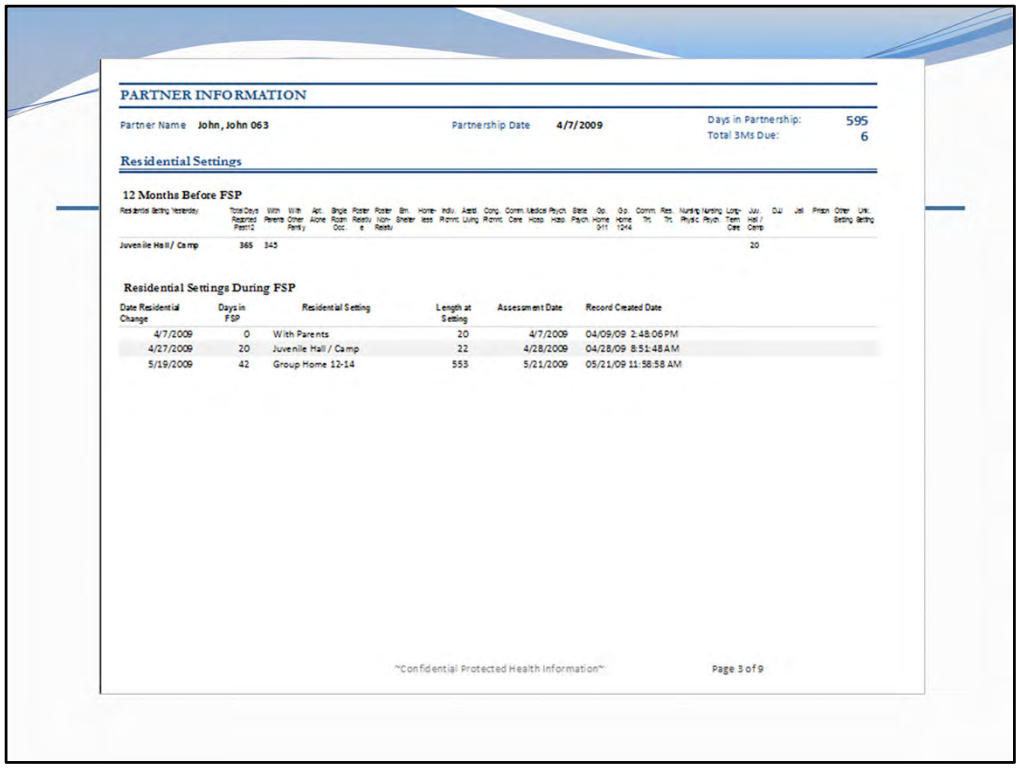
Assessment Date	Days in Partnership	For Quarter	Age Group at Time of Assessment
7/30/2009	114	1	TAY
10/8/2009	184	2	TAY
6/25/2010	444	5	TAY
9/24/2010	535	6	TAY

History of Administrative Changes

Assess-ment Date	Date Change of Prov.	Provider	Date Change of Program	Program	Date Change of Coor.	Coordinator	Date Change of Status	Status	Discontinue Reason	Date Change of AB2034	AB2034 Status	Date Change of GHI	GHI Status	Date Change MHSA	MHSA Status
4/7/2009	4/7/2009	1234	4/7/2009	Wraparound	4/7/2009	Laura, Laura	4/7/2009	Active		4/7/2009	Not Enrolled	4/7/2009	Not Enrolled	4/7/2009	Not Enrolled
4/9/2009					4/9/2009	Ann, Ann									
1/3/2011							11/23/2010	Discontinued	Met Goals						

"Confidential Protected Health Information" Page 2 of 9

This slide displays the 3M Assessments and Administrative Changes page of the report.



PARTNER INFORMATION

Partner Name John, John 063 Partnership Date 4/7/2009 Days in Partnership: 595
Total 3Ms Due: 6

Residential Settings

12 Months Before FSP

Residential Setting Yesterday	Total Days Reported Past12	With Parents	With Other Family	Apt. Alone	Single Room Occ.	Foster Reside	Foster Non-Reside	Emergency Shelter	Homeless	Indiv. Permnt	Assist. Living	Cong. Permnt.	Comm. Care	Medical Hosp.	Psych Hosp.	State Psych.	Gp. Home 9/11	Gp. Home 12-14	Comm. Trt.	Res. Trt.	Nursing Physic	Nursing Psych	Long-Term Care	Juv. Hall / Camp	DUI	Jail	Prison	Other Setting	Unk. Setting
Juvenile Hall / Camp	365	345																						20					

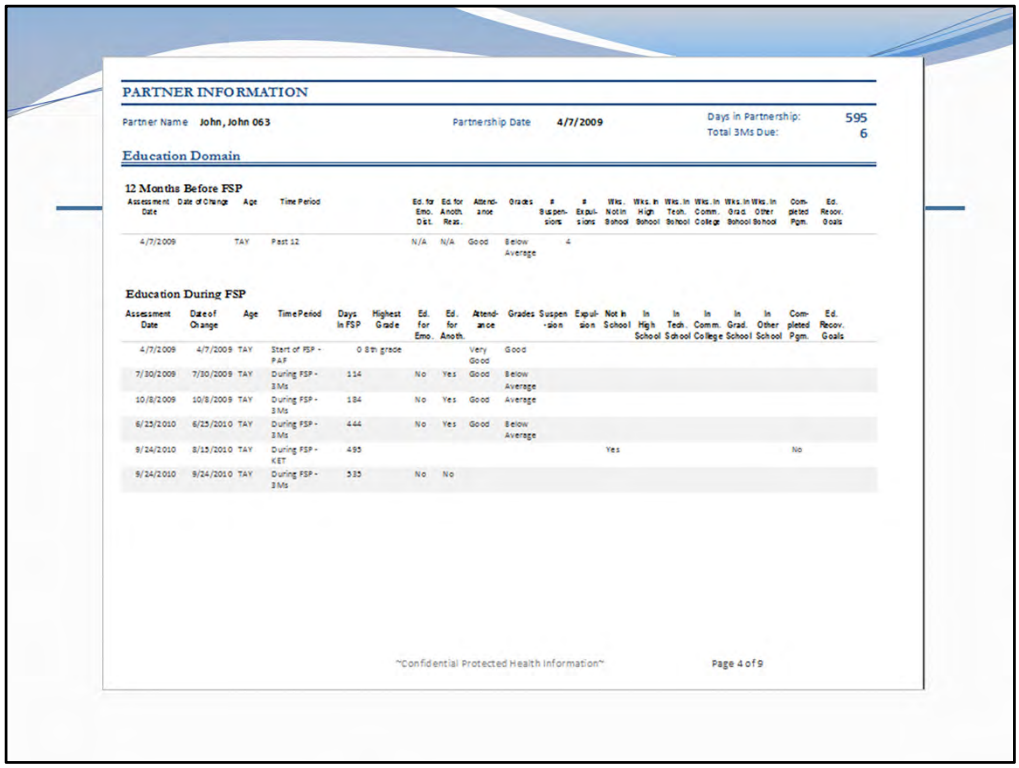
Residential Settings During FSP

Date Residential Change	Days in FSP	Residential Setting	Length of Setting	Assessment Date	Record Created Date
4/7/2009	0	With Parents	20	4/7/2009	04/09/09 2:48:06 PM
4/27/2009	20	Juvenile Hall / Camp	22	4/28/2009	04/28/09 8:51:48 AM
5/19/2009	42	Group Home 12-14	553	5/21/2009	05/21/09 11:58:58 AM

"Confidential Protected Health Information"

Page 3 of 9

This slide displays the Residential Settings Domain page of the report.



PARTNER INFORMATION

Partner Name John, John 063 Partnership Date 4/7/2009 Days in Partnership: 595
Total 3Ms Due: 6

Education Domain

12 Months Before FSP

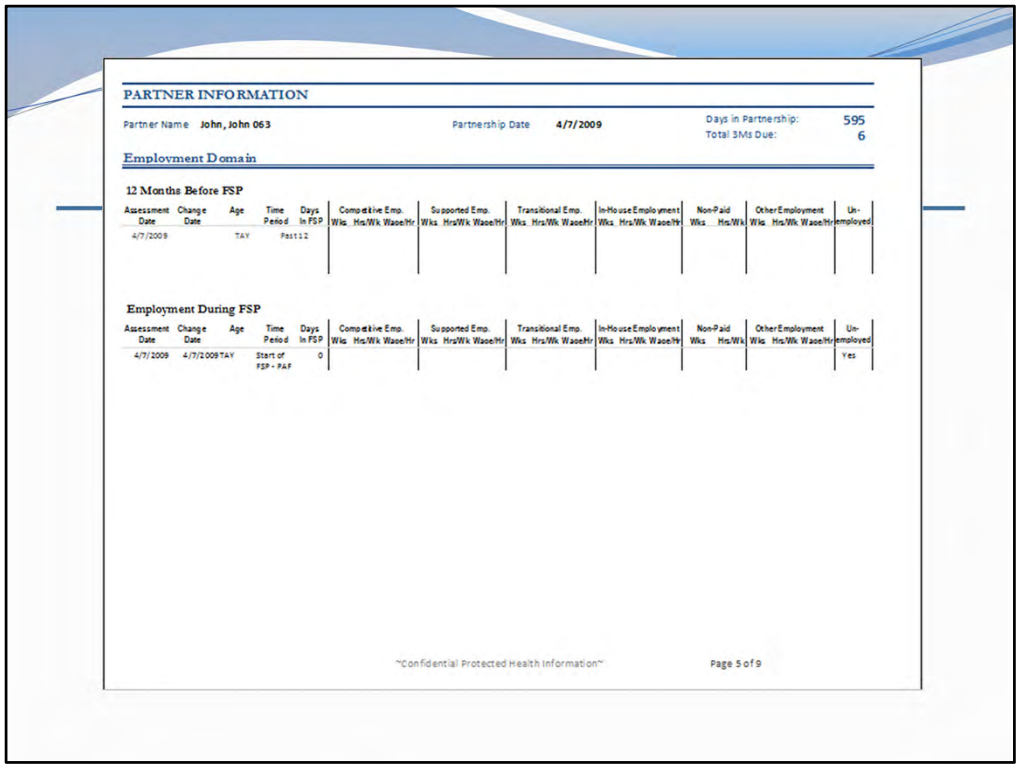
Assessment Date	Date of Change	Age	Time Period	Ed. for Emo. Dist.	Ed. for Anoth. Reas.	Attend-ance	Grades	# Suspen-sions	# Expul-sions	Wks. Not in School	Wks. in High School	Wks. in Tech. School	Wks. in Comm. College	Wks. in Grad School	Wks. in Other School	Com-pleted Pgm.	Ed. Recov. Goals
4/7/2009		TAY	Past 12	N/A	N/A	Good	Below Average	4									

Education During FSP

Assessment Date	Date of Change	Age	Time Period	Days in FSP	Highest Grade	Ed. for Emo.	Ed. for Anoth.	Attend-ance	Grades	Suspen-sion	Expul-sion	Not in School	In High School	In Tech. School	In Comm. College	In Grad. School	In Other School	Com-pleted Pgm.	Ed. Recov. Goals
4/7/2009	4/7/2009	TAY	Start of FSP - PAF	0	8th grade			Very Good	Good										
7/30/2009	7/30/2009	TAY	During FSP - 3Ms	114		No	Yes	Good	Below Average										
10/8/2009	10/8/2009	TAY	During FSP - 3Ms	184		No	Yes	Good	Average										
6/25/2010	6/25/2010	TAY	During FSP - 3Ms	444		No	Yes	Good	Below Average										
8/24/2010	8/15/2010	TAY	During FSP - KET	495								Yes						No	
8/24/2010	8/24/2010	TAY	During FSP - 3Ms	535		No	No												

"Confidential Protected Health Information" Page 4 of 9

This slide displays the Education Domain page of the report.



PARTNER INFORMATION

Partner Name John, John 063 Partnership Date 4/7/2009 Days in Partnership: 595
Total 3Ms Due: 6

Employment Domain

12 Months Before FSP

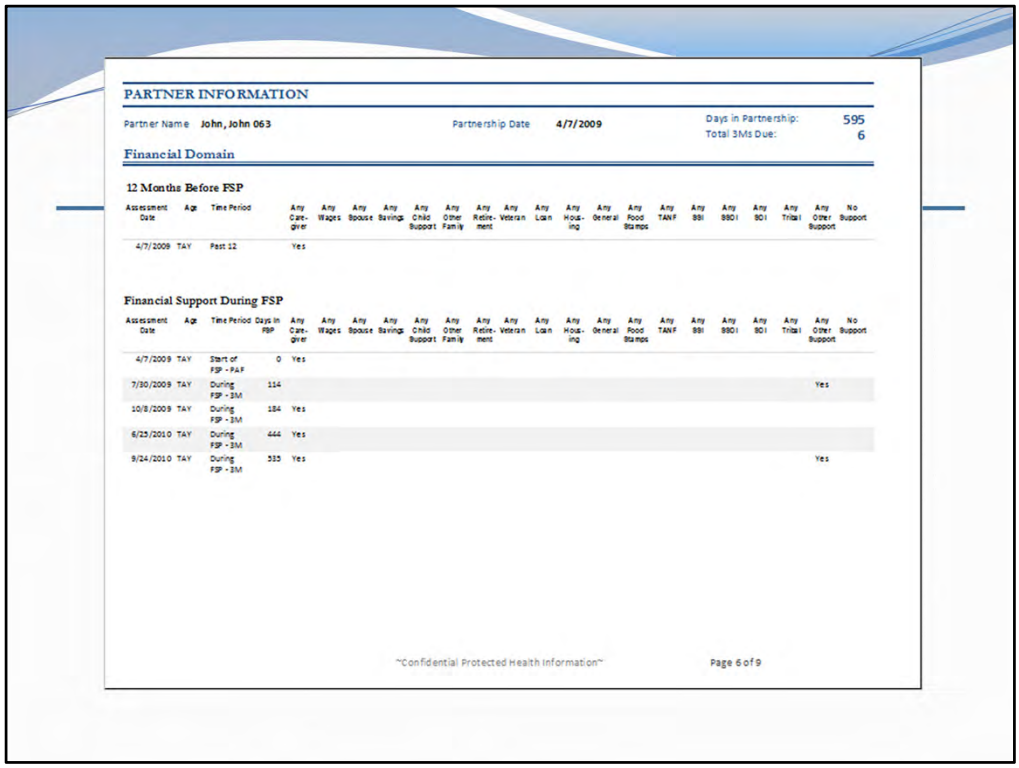
Assessment Date	Change Date	Age	Time Period	Days In FSP	Competitive Emp. Wks	Hrs/Wk	Wage/Hr	Supported Emp. Wks	Hrs/Wk	Wage/Hr	Transitional Emp. Wks	Hrs/Wk	Wage/Hr	In-House Employment Wks	Hrs/Wk	Wage/Hr	Non-Paid Wks	Hrs/Wk	Other Employment Wks	Hrs/Wk	Wage/Hr	Un-employed
4/7/2009		TAY	Past 12																			

Employment During FSP

Assessment Date	Change Date	Age	Time Period	Days In FSP	Competitive Emp. Wks	Hrs/Wk	Wage/Hr	Supported Emp. Wks	Hrs/Wk	Wage/Hr	Transitional Emp. Wks	Hrs/Wk	Wage/Hr	In-House Employment Wks	Hrs/Wk	Wage/Hr	Non-Paid Wks	Hrs/Wk	Other Employment Wks	Hrs/Wk	Wage/Hr	Un-employed
4/7/2009	4/7/2009	TAY	Start of FSP - PAF	0																		Yes

"Confidential Protected Health Information" Page 5 of 9

This slide displays the Employment Domain page of the report.



PARTNER INFORMATION

Partner Name John, John 063 Partnership Date 4/7/2009 Days in Partnership: 595 Total 3Ms Due: 6

Financial Domain

12 Months Before FSP

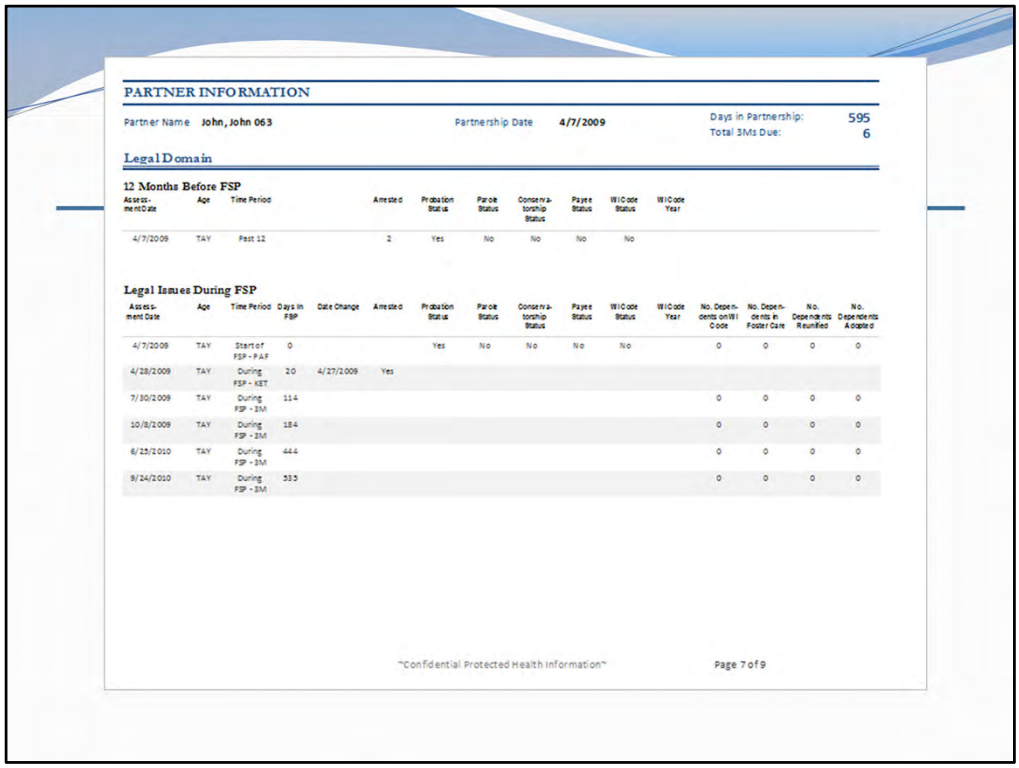
Assessment Date	Age	Time Period	Any Care-giver	Any Wages	Any Spouse	Any Savings	Any Child Support	Any Other Family	Any Retire-ment	Any Veteran	Any Loan	Any Hous-ing	Any General	Any Food Stamps	Any TANF	Any SSI	Any SSDI	Any SOI	Any Tribal	Any Other Support	No Support
4/7/2009	TAY	Past 12	Yes																		

Financial Support During FSP

Assessment Date	Age	Time Period	Days in FSP	Any Care-giver	Any Wages	Any Spouse	Any Savings	Any Child Support	Any Other Family	Any Retire-ment	Any Veteran	Any Loan	Any Hous-ing	Any General	Any Food Stamps	Any TANF	Any SSI	Any SSDI	Any SOI	Any Tribal	Any Other Support	No Support
4/7/2009	TAY	Start of FSP - PAF	0	Yes																		
7/30/2009	TAY	During FSP - 3M	114																		Yes	
10/8/2009	TAY	During FSP - 3M	184	Yes																		
6/25/2010	TAY	During FSP - 3M	444	Yes																		
9/24/2010	TAY	During FSP - 3M	535	Yes																	Yes	

"Confidential Protected Health Information" Page 6 of 9

This slide displays the Financial Domain page of the report.



PARTNER INFORMATION

Partner Name John, John 063 Partnership Date 4/7/2009 Days in Partnership: 595
Total 3Ms Due: 6

Legal Domain

12 Months Before FSP

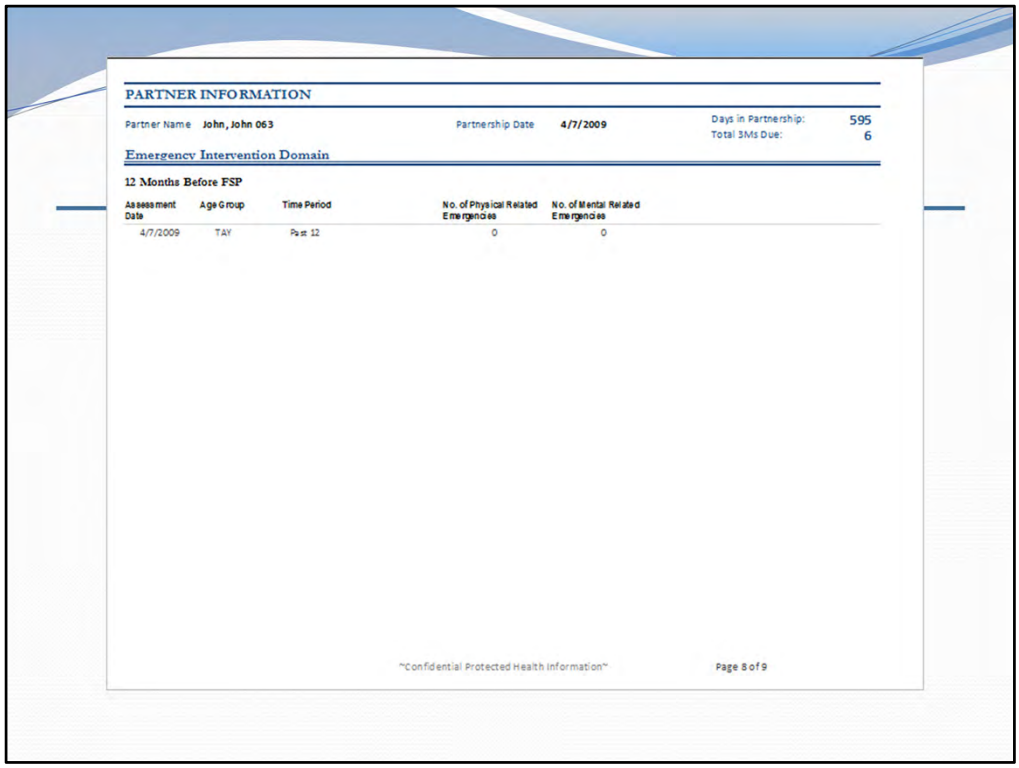
Assessment Date	Age	Time Period	Arrested	Probation Status	Parole Status	Conservatorship Status	Payee Status	WIC Code Status	WIC Code Year
4/7/2009	TAY	Past 12	2	Yes	No	No	No	No	

Legal Issues During FSP

Assessment Date	Age	Time Period	Days in FSP	Date Change	Arrested	Probation Status	Parole Status	Conservatorship Status	Payee Status	WIC Code Status	WIC Code Year	No. Dependents on WI Code	No. Dependents in Foster Care	No. Dependents Reunified	No. Dependents Adopted
4/7/2009	TAY	Start of FSP - PAF	0			Yes	No	No	No	No		0	0	0	0
4/28/2009	TAY	During FSP - KET	20	4/27/2009	Yes										
7/30/2009	TAY	During FSP - 3M	114									0	0	0	0
10/8/2009	TAY	During FSP - 3M	184									0	0	0	0
6/25/2010	TAY	During FSP - 3M	444									0	0	0	0
9/24/2010	TAY	During FSP - 3M	533									0	0	0	0

"Confidential Protected Health Information" Page 7 of 9

This slide displays the Legal Domain page of the report.



PARTNER INFORMATION

Partner Name John, John 063 Partnership Date 4/7/2009 Days in Partnership: 595
Total 3Ms Due: 6

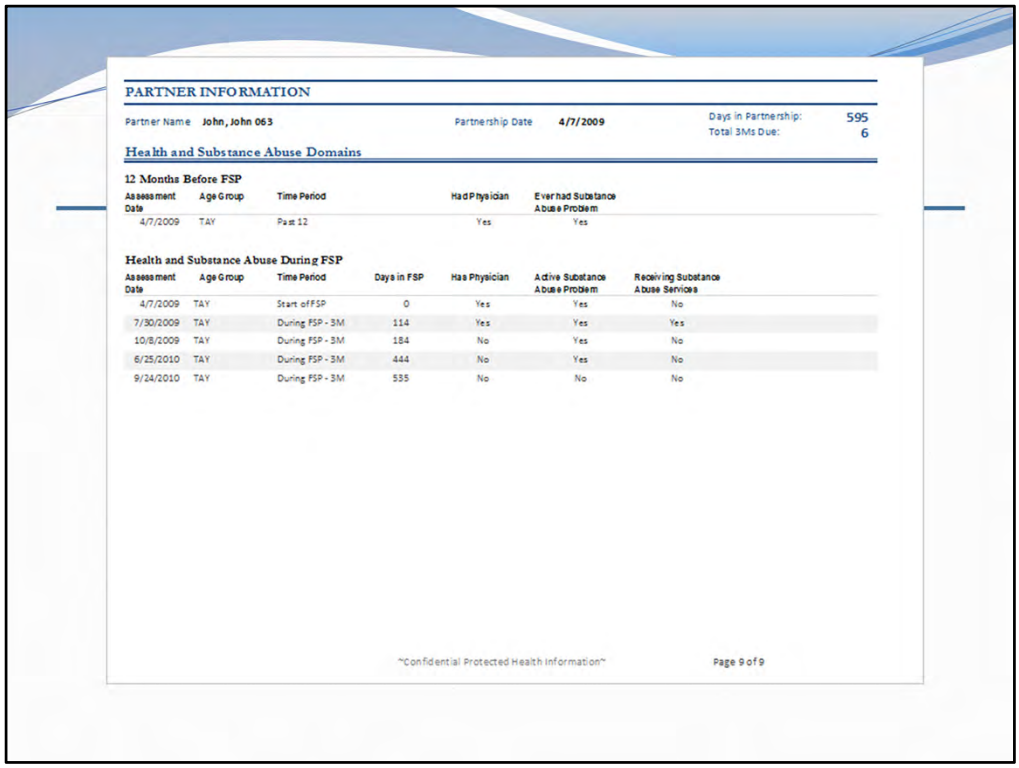
Emergency Intervention Domain

12 Months Before FSP

Assessment Date	Age Group	Time Period	No. of Physical Related Emergencies	No. of Mental Related Emergencies
4/7/2009	TAY	Past 12	0	0

"Confidential Protected Health Information" Page 8 of 9

This slide displays the Emergency Intervention Domain page of the report.



PARTNER INFORMATION

Partner Name: John, John 063 | Partnership Date: 4/7/2009 | Days in Partnership: 595 | Total 3Ms Due: 6

Health and Substance Abuse Domains

12 Months Before FSP

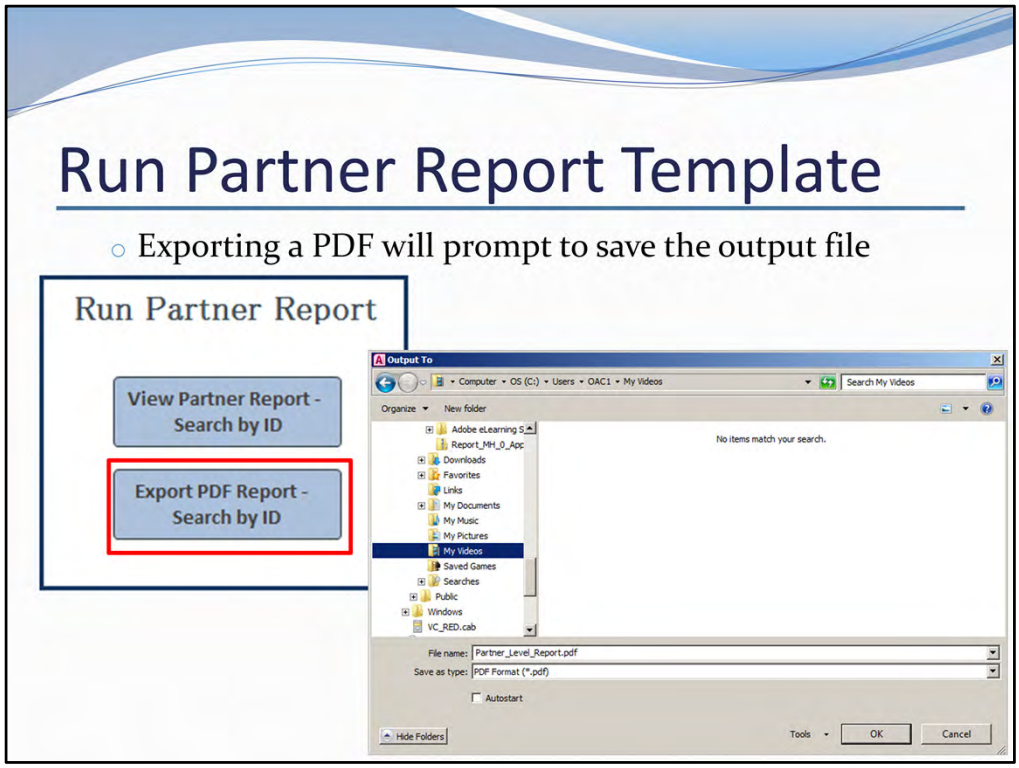
Assessment Date	Age Group	Time Period	Had Physician	Ever had Substance Abuse Problem
4/7/2009	TAY	Past 12	Yes	Yes

Health and Substance Abuse During FSP

Assessment Date	Age Group	Time Period	Days in FSP	Has Physician	Active Substance Abuse Problem	Receiving Substance Abuse Services
4/7/2009	TAY	Start of FSP	0	Yes	Yes	No
7/30/2009	TAY	During FSP - 3M	114	Yes	Yes	Yes
10/8/2009	TAY	During FSP - 3M	184	No	Yes	No
6/25/2010	TAY	During FSP - 3M	444	No	Yes	No
9/24/2010	TAY	During FSP - 3M	535	No	No	No

"Confidential Protected Health Information" Page 9 of 9

This slide displays the Health and Substance Abuse Domains page of the report.

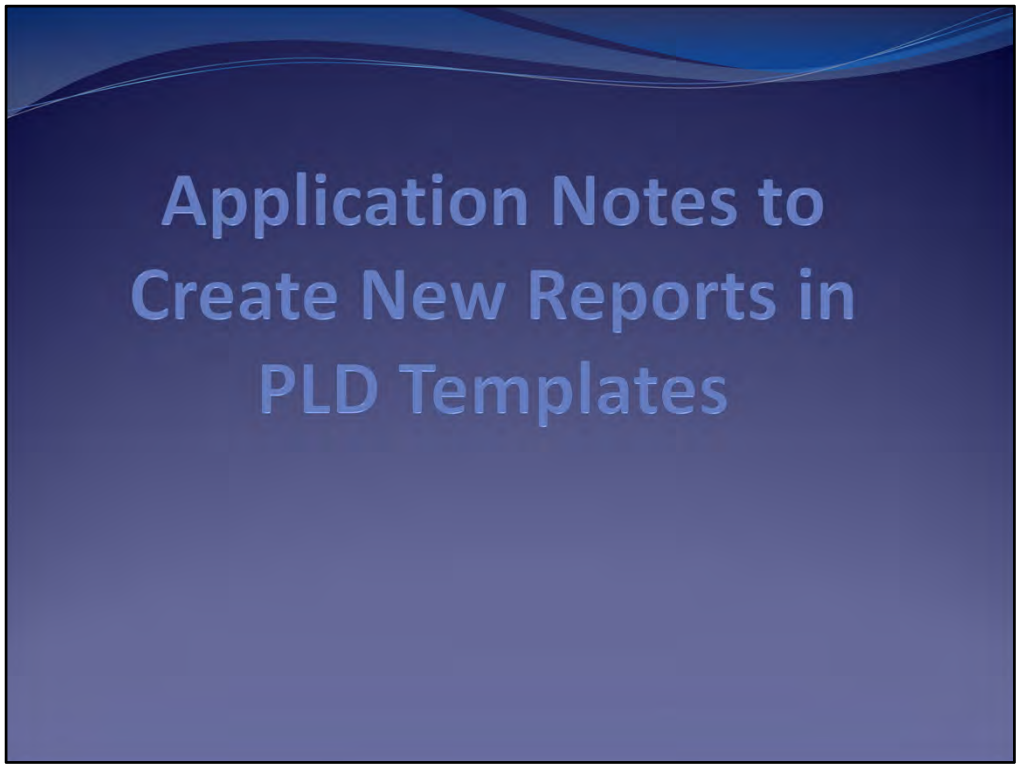


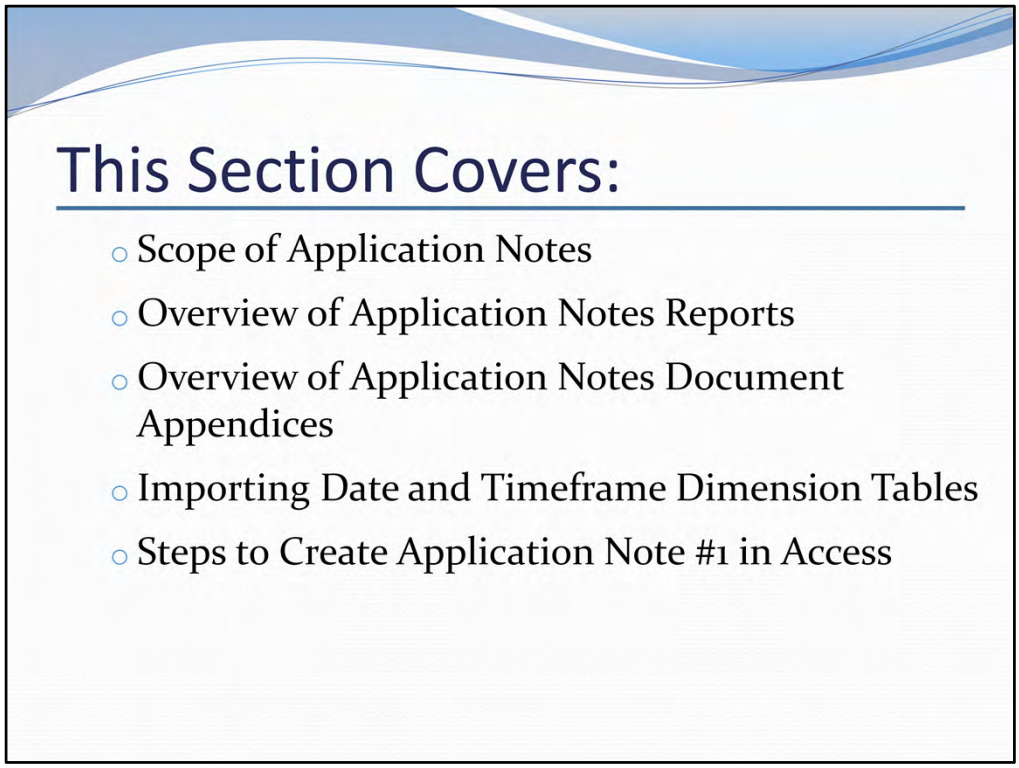
The **Export PDF Report – Search by ID** button will export a PDF file of a partnership report to a desired location on your network. There are two options for identifying the partnership for the report. You can enter a CSI number in the first pop-up window or enter a Global ID in the second pop-up window.

To export a report for a specific partnership, click on the **Export PDF Report – Search by ID** button under the “Run Partner Report” heading.

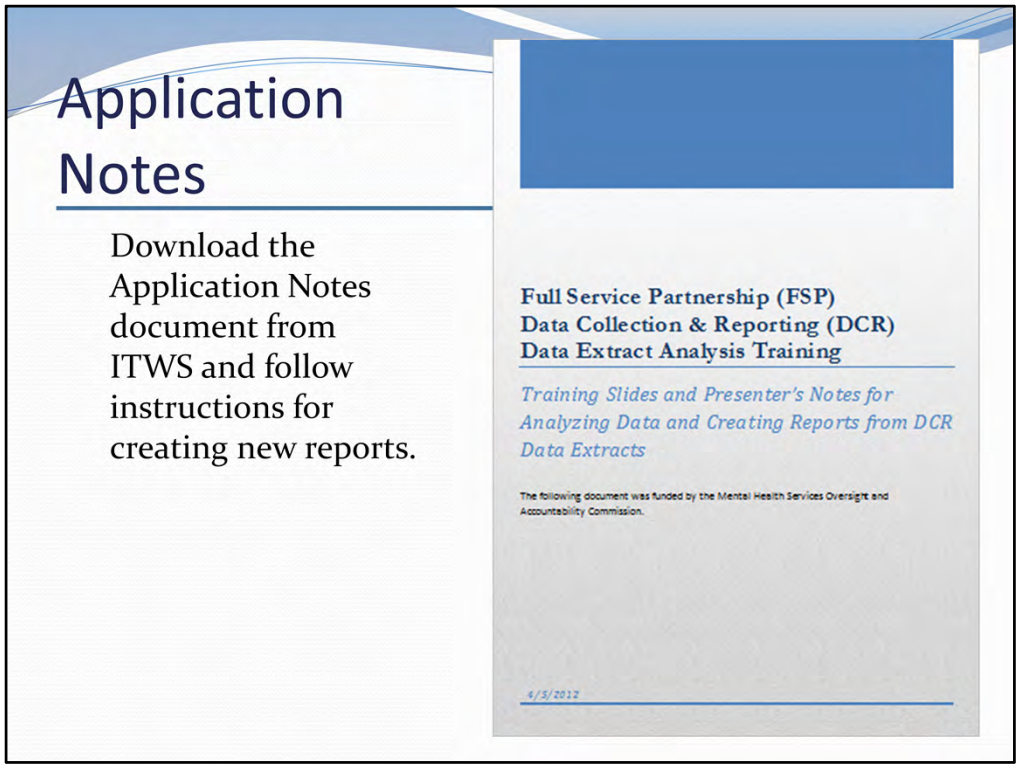
As seen in this slide, an “Output To” window will appear which is used to designate a location and file name for the report. The default name of the report, “Partner_Level_Report”, can be changed. Use the navigation pane on the left-hand side of the window to select a folder to which the PDF report will be saved. Select the **Autostart** checkbox if you would like the report to be opened automatically when the export and save process is complete. Then click **OK**. Selecting **Cancel** will return you to the front page without exporting the report.

After the partner ID search criteria are entered, the PDF file will be generated and the file will be saved in the selected location. If the **Autostart** checkbox was marked, a copy of the report will open in a PDF viewing application.


Application Notes to
Create New Reports in
PLD Templates

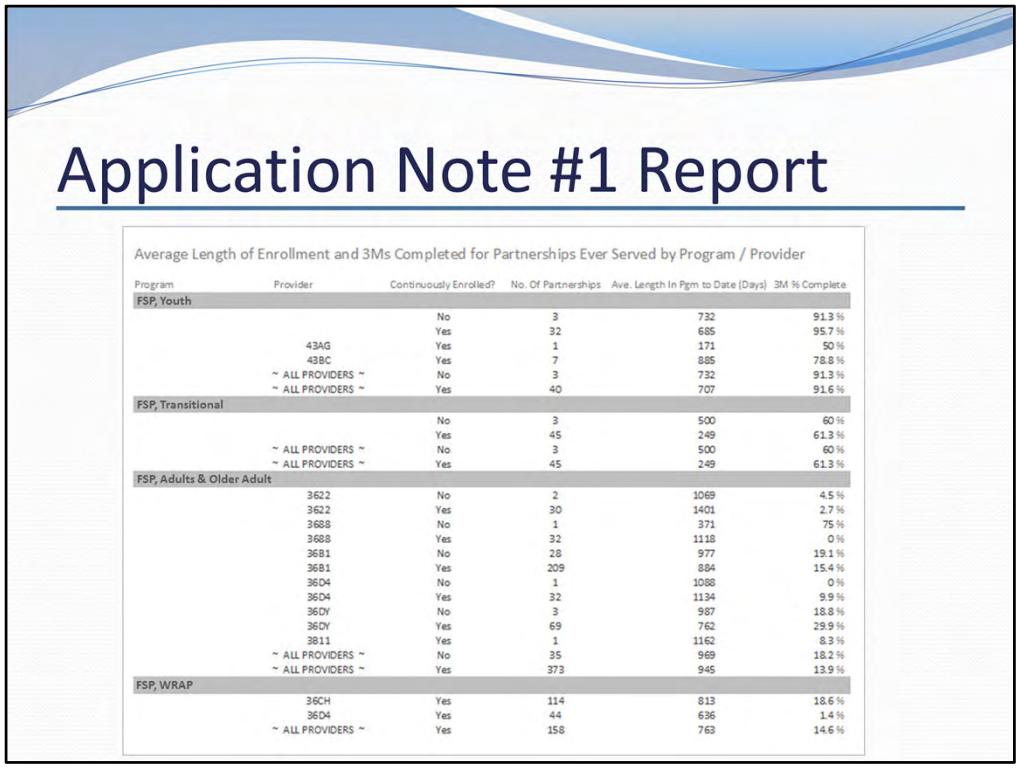

This Section Covers:
Scope of Application Notes
Overview of Application Notes Reports
Overview of Application Notes Document Appendices
Importing Date and Timeframe Dimension Tables
Steps to Create Application Note #1 in Access

This section provides an overview of the Application Notes document and appendices, and it covers the detailed steps to create the Application Note #1 report in Microsoft Access.

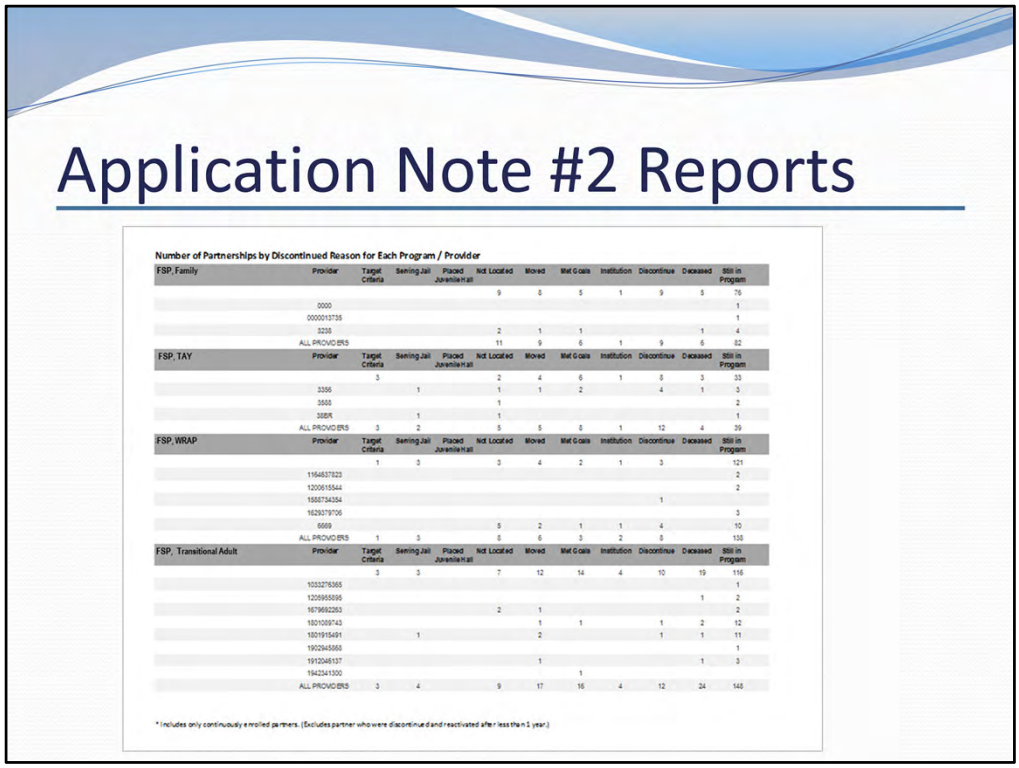

Application Notes
Download the Application Notes document from ITWS and follow instructions for creating new reports.
Full Service Partnership (FSP)
Data Collection & Reporting (DCR)
Data Extract Analysis Training
Training Slides and Presenter's Notes for Analyzing Data and Creating Reports from DCR Data Extracts
The following document was funded by the Mental Health Services Oversight and Accountability Commission.
4/3/2012

The Application Notes provide instruction for using Microsoft Access and/or Microsoft Excel applications to analyze the Full Service Partnership (FSP) DCR CSV data downloads. These instructions provide two examples for analyzing the DCR CSV files to create reports for partners' length of service by provider. In the first Application Note, instructions are provided for creating a report which identifies the average length of service for partners by program and provider. This report also identifies the percent of quarterly (3M) assessments which were completed for the partners. The second Application Note provides instruction to create a report for the average length of service for partners based on reason of discontinuation from partnership.

In January 2012, County Data Quality Reports were provided for each county/region based on the data reported to the FSP DCR. The purpose of the County Data Quality Report was to describe all of each county's data and to identify inconsistent or outlying data points. Counties participated in a survey rating the utility of the section of the reports. The Application Notes are constructed for the report sections which received the highest score based on the results of the survey and provide instruction to reproduce two of the sub-reports from the Data Quality Reports by utilizing the county's downloaded FSP DCR data files at any point in time.

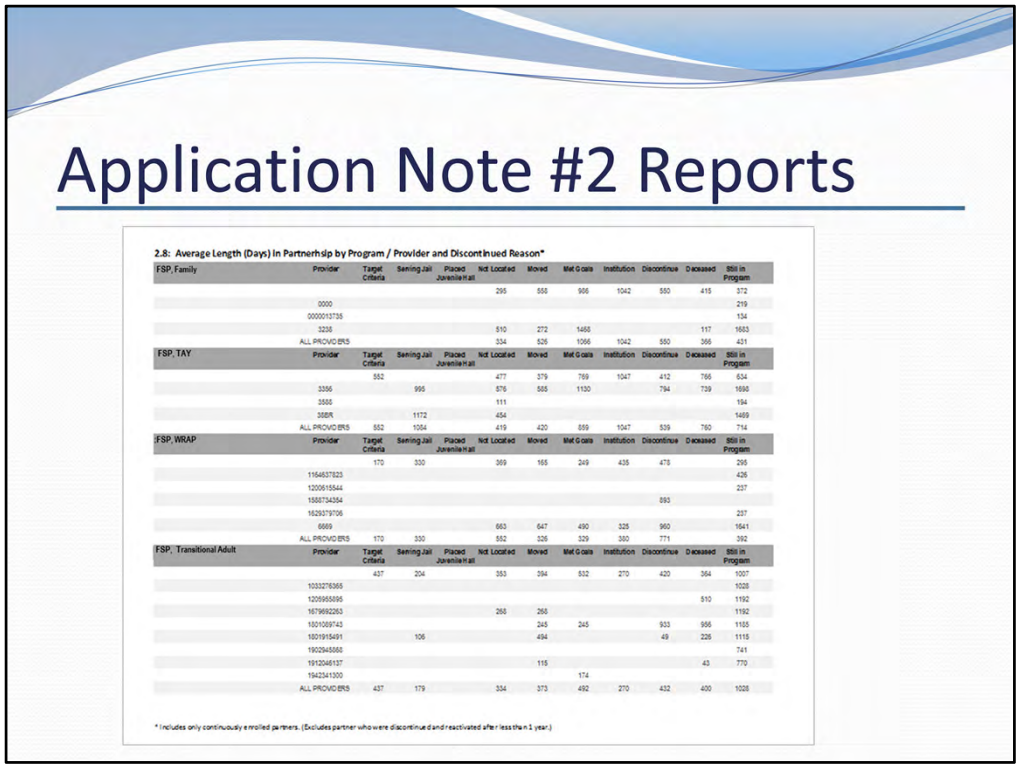

Application Note #1 Report
Average Length of Enrollment and 3Ms Completed for Partnerships Ever Served by Program / Provider
Program | Provider | Continuously Enrolled? | No. Of Partnerships | Ave. Length In Pgm to Date (Days) | 3M % Complete
FSP, Youth
No 3 732 91.3 %
Yes 32 685 95.7 %
43AG Yes 1 171 50 %
43BC Yes 7 885 78.8 %
~ ALL PROVIDERS ~ No 3 732 91.3 %
~ ALL PROVIDERS ~ Yes 40 707 91.6 %
FSP, Transitional
No 3 500 60 %
Yes 45 249 61.3 %
~ ALL PROVIDERS ~ No 3 500 60 %
~ ALL PROVIDERS ~ Yes 45 249 61.3 %
FSP, Adults & Older Adult
3622 No 2 1069 4.5 %
3622 Yes 30 1401 2.7 %
3688 No 1 371 75 %
3688 Yes 32 1118 0 %
36B1 No 28 977 19.1 %
36B1 Yes 209 884 15.4 %
36D4 No 1 1088 0 %
36D4 Yes 32 1134 9.9 %
36DY No 3 987 18.8 %
36DY Yes 69 762 29.9 %
3811 Yes 1 1162 8.3 %
~ ALL PROVIDERS ~ No 35 969 18.2 %
~ ALL PROVIDERS ~ Yes 373 945 13.9 %
FSP, WRAP
36CH Yes 114 813 18.6 %
36D4 Yes 44 636 1.4 %
~ ALL PROVIDERS ~ Yes 158 763 14.6 %

Application Note #1 explains how to create the report "Average Length of Enrollment and 3Ms Completed for Partnerships Ever Served by Program / Provider" (similar to Section 2.2 in the Data Quality Reports). An example of this report can be seen in this slide. The report summarizes the number of continuous or discontinuous partners, the average length of partnerships and percent of 3Ms completed by provider and by program.

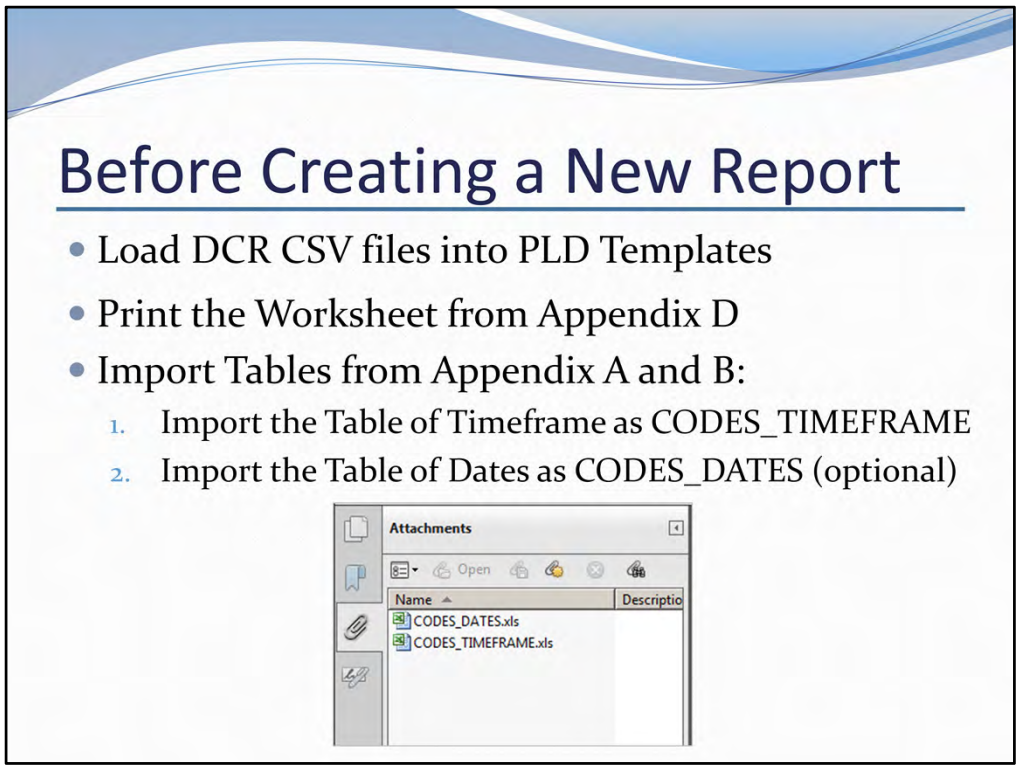


Application Note #2 explains how to make two related reports: the "Number of Partnerships by Discontinued Reason for Each Program / Provider" (similar to Section 2.7 in the Data Quality Reports) and the “Average Length (Days) in Partnership by Program / Provider and Discontinued Reason" (similar to Section 2.8 in the Data Quality Reports). An example of these reports can be seen in this slide and the next slide.

The first report summarizes the number of partnerships by discontinue reason for each provider and program.



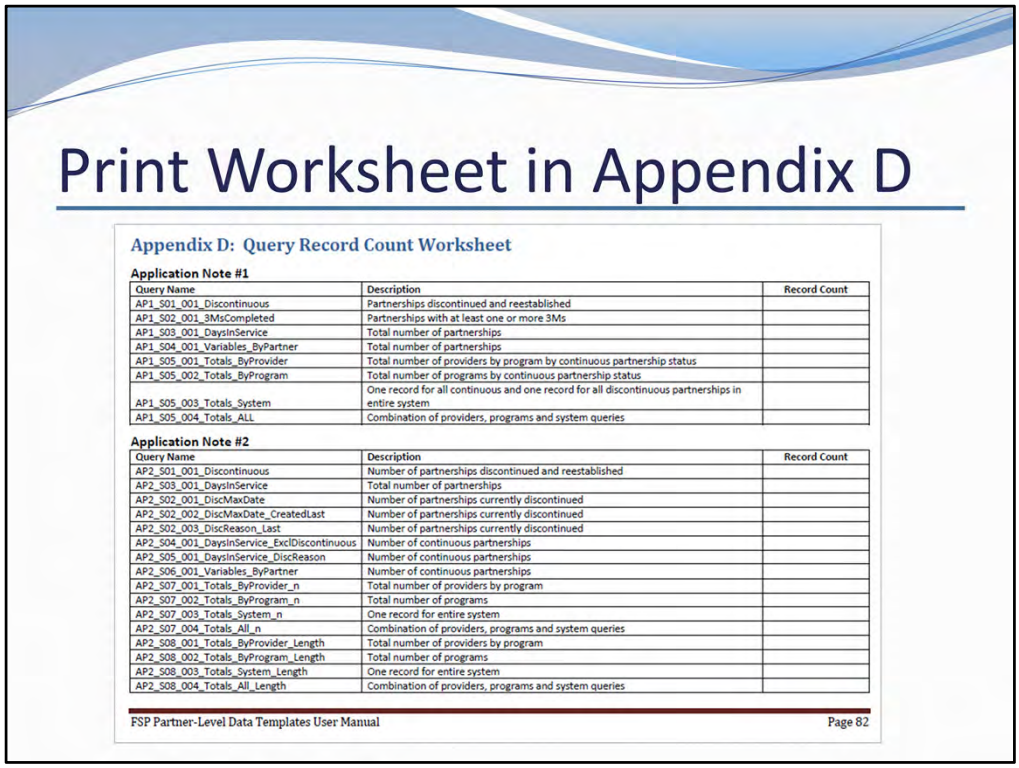
The second report summarizes the average length of partnership by discontinue reason for each provider and program.


Before Creating a New Report
Load DCR CSV files into PLD Templates
Print the Worksheet from Appendix D
Import Tables from Appendix A and B:
1. Import the Table of Timeframe as CODES_TIMEFRAME
2. Import the Table of Dates as CODES_DATES (optional)
Attachments
Open
Name
Descriptio
CODES_DATES.xls
CODES_TIMEFRAME.xls

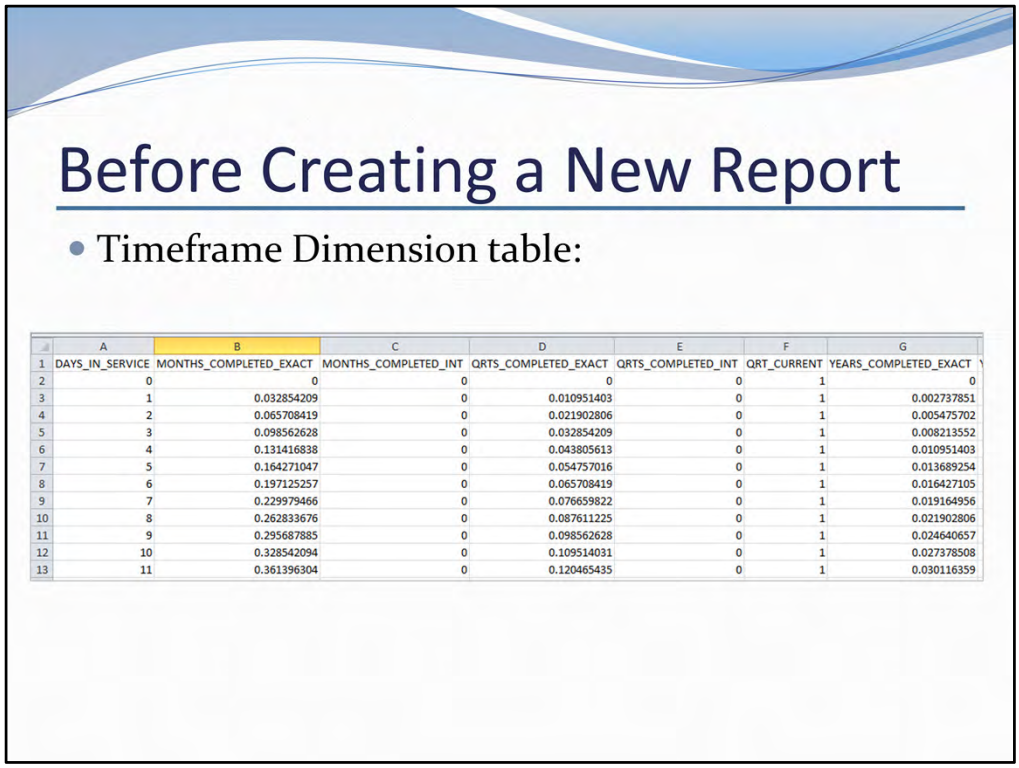
It is often desired to separate data into length timeframes or into date ranges when creating reports. One way to quickly define partnership timeframes (e.g., number of quarters a partnership has completed) or date ranges (e.g., fiscal years) is to create a table with definitions of the several combinations of groupings which may be required depending on the purpose of the report.

Reference: Kimball, Ralph; Ross, Margy. (2002). *The Data Warehouse Toolkit: The Complete Guide to Dimensional Modeling, Second Edition.* New York: Wiley Computer Publishing.

Before starting, load the four DCR CSV files into the PLD Templates. Import the tables from Appendix A (required) and Appendix B (optional) of the Application Notes document into the database and name them as noted in this slide. As seen in this slide, the data tables can be accessed by selecting the paperclip icon in the PDF Application Notes document and double clicking on the file.


Print Worksheet in Appendix D
Appendix D: Query Record Count Worksheet
Application Note #1
Query Name | Description | Record Count
AP1_S01_001_Discontinuous | Partnerships discontinued and reestablished
AP1_S02_001_3MsCompleted | Partnerships with at least one or more 3Ms
AP1_S03_001_DaysInService | Total number of partnerships
AP1_S04_001_Variables_ByPartner | Total number of partnerships
AP1_S05_001_Totals_ByProvider | Total number of providers by program by continuous partnership status
AP1_S05_002_Totals_ByProgram | Total number of programs by continuous partnership status
AP1_S05_003_Totals_System | One record for all continuous and one record for all discontinuous partnerships in entire system
AP1_S05_004_Totals_ALL | Combination of providers, programs and system queries
Application Note #2
Query Name | Description | Record Count
AP2_S01_001_Discontinuous | Number of partnerships discontinued and reestablished
AP2_S03_001_DaysInService | Total number of partnerships
AP2_S02_001_DiscMaxDate | Number of partnerships currently discontinued
AP2_S02_002_DiscMaxDate_CreatedLast | Number of partnerships currently discontinued
AP2_S02_003_DiscReason_Last | Number of partnerships currently discontinued
AP2_S04_001_DaysInService_ExclDiscontinuous | Number of continuous partnerships
AP2_S05_001_DaysInService_DiscReason | Number of continuous partnerships
AP2_S06_001_Variables_ByPartner | Number of continuous partnerships
AP2_S07_001_Totals_ByProvider_n | Total number of providers by program
AP2_S07_002_Totals_ByProgram_n | Total number of programs
AP2_S07_003_Totals_System_n | One record for entire system
AP2_S07_004_Totals_All_n | Combination of providers, programs and system queries
AP2_S08_001_Totals_ByProvider_Length | Total number of providers by program
AP2_S08_002_Totals_ByProgram_Length | Total number of programs
AP2_S08_003_Totals_System_Length | One record for entire system
AP2_S08_004_Totals_All_Length | Combination of providers, programs and system queries
FSP Partner-Level Data Templates User Manual
Page 82

Appendix D contains a helpful worksheet to use while tracking and validating the number of records in each query while creating the reports.

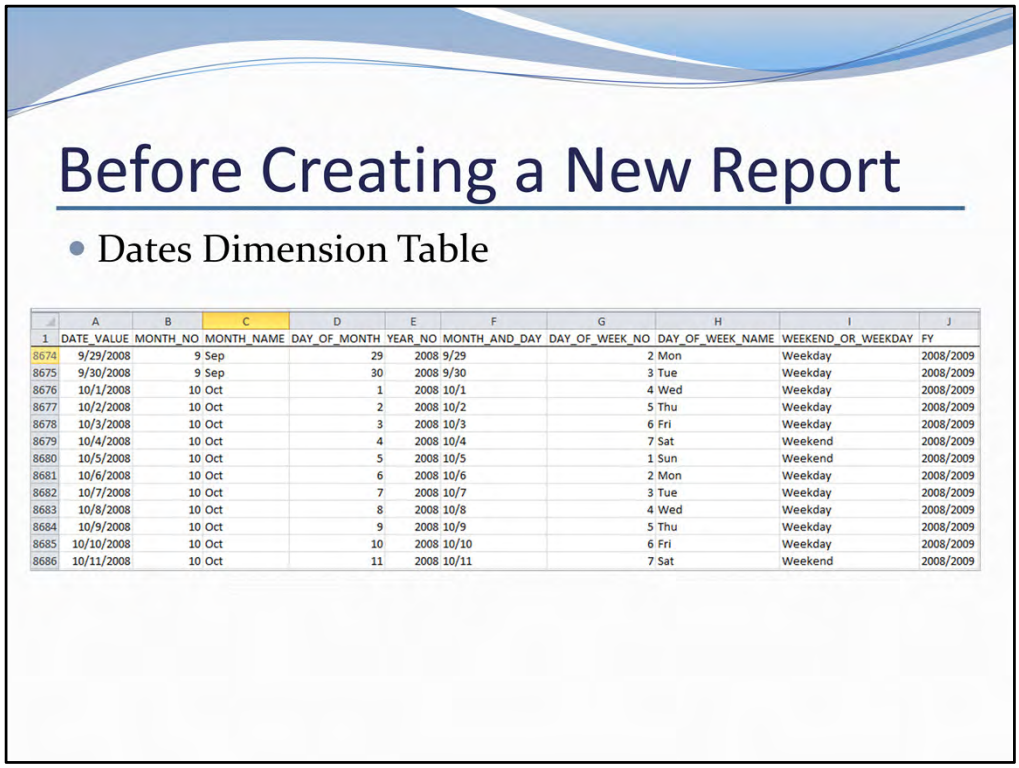


	A	B	C	D	E	F	G
1	DAYS_IN_SERVICE	MONTHS_COMPLETED_EXACT	MONTHS_COMPLETED_INT	QRTS_COMPLETED_EXACT	QRTS_COMPLETED_INT	QRT_CURRENT	YEARS_COMPLETED_EXACT
2	0	0	0	0	0	1	0
3	1	0.032854209	0	0.010951403	0	1	0.002737851
4	2	0.065708419	0	0.021902806	0	1	0.005475702
5	3	0.098562628	0	0.032854209	0	1	0.008213552
6	4	0.131416838	0	0.043805613	0	1	0.010951403
7	5	0.164271047	0	0.054757016	0	1	0.013689254
8	6	0.197125257	0	0.065708419	0	1	0.016427105
9	7	0.229979466	0	0.076659822	0	1	0.019164956
10	8	0.262833676	0	0.087611225	0	1	0.021902806
11	9	0.295687885	0	0.098562628	0	1	0.024640657
12	10	0.328542094	0	0.109514031	0	1	0.027378508
13	11	0.361396304	0	0.120465435	0	1	0.030116359

The Microsoft Excel file displayed in this slide defines the following groupings of partnership length timeframes based on the number of days in partnership service. Import this file as a new table in a Microsoft Access database to assist in aggregating and summarizing data based on the length of service for a partnership.

Timeframes Defined based on Days in Service

1. Months – Exact Fraction Completed
2. Months – Rounded to Total Completed
3. Quarters – Exact Fraction Completed
4. Quarters – Rounded to Total Completed
5. Years – Exact Fraction Completed
6. Years – Rounded to Total Completed
7. Timeframe – Three-Month Labels (e.g, “3Months”, “6Months”, etc.)
8. Timeframe Categories – Simple grouping example based on Timeframe field
9. 3Ms Due – The number of 3Ms which would be due based on the number of days in service

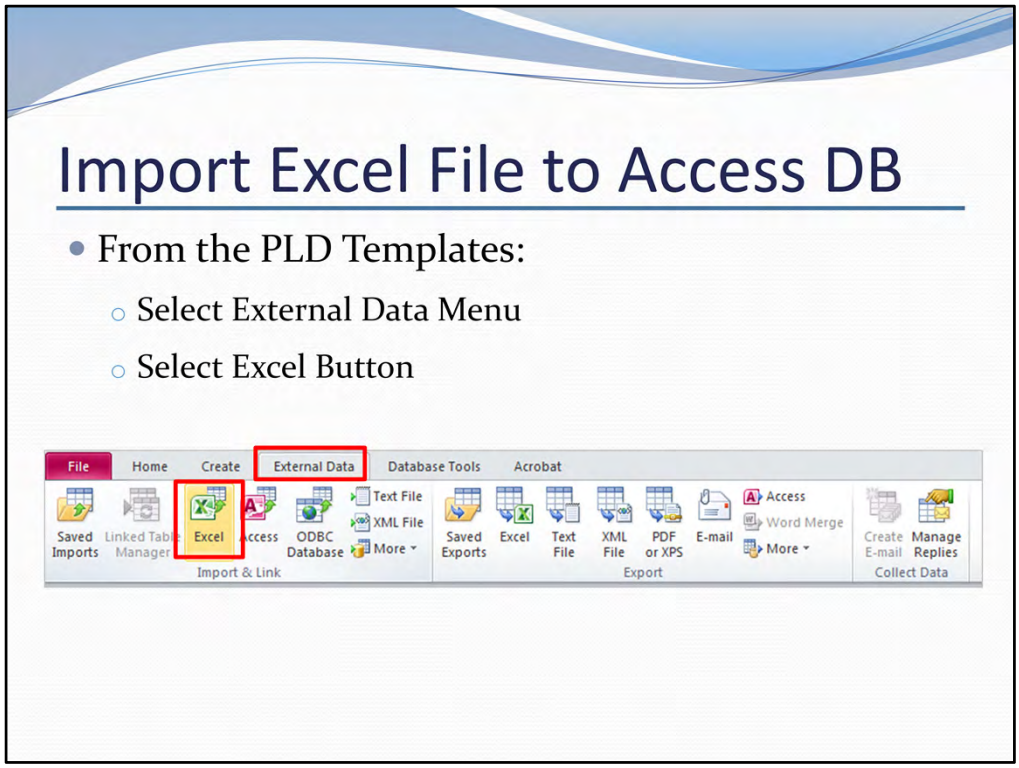


	A	B	C	D	E	F	G	H	I	J
1	DATE_VALUE	MONTH_NO	MONTH_NAME	DAY_OF_MONTH	YEAR_NO	MONTH_AND_DAY	DAY_OF_WEEK_NO	DAY_OF_WEEK_NAME	WEEKEND_OR_WEEKDAY	FY
8674	9/29/2008	9	Sep	29	2008	9/29	2	Mon	Weekday	2008/2009
8675	9/30/2008	9	Sep	30	2008	9/30	3	Tue	Weekday	2008/2009
8676	10/1/2008	10	Oct	1	2008	10/1	4	Wed	Weekday	2008/2009
8677	10/2/2008	10	Oct	2	2008	10/2	5	Thu	Weekday	2008/2009
8678	10/3/2008	10	Oct	3	2008	10/3	6	Fri	Weekday	2008/2009
8679	10/4/2008	10	Oct	4	2008	10/4	7	Sat	Weekend	2008/2009
8680	10/5/2008	10	Oct	5	2008	10/5	1	Sun	Weekend	2008/2009
8681	10/6/2008	10	Oct	6	2008	10/6	2	Mon	Weekday	2008/2009
8682	10/7/2008	10	Oct	7	2008	10/7	3	Tue	Weekday	2008/2009
8683	10/8/2008	10	Oct	8	2008	10/8	4	Wed	Weekday	2008/2009
8684	10/9/2008	10	Oct	9	2008	10/9	5	Thu	Weekday	2008/2009
8685	10/10/2008	10	Oct	10	2008	10/10	6	Fri	Weekday	2008/2009
8686	10/11/2008	10	Oct	11	2008	10/11	7	Sat	Weekend	2008/2009

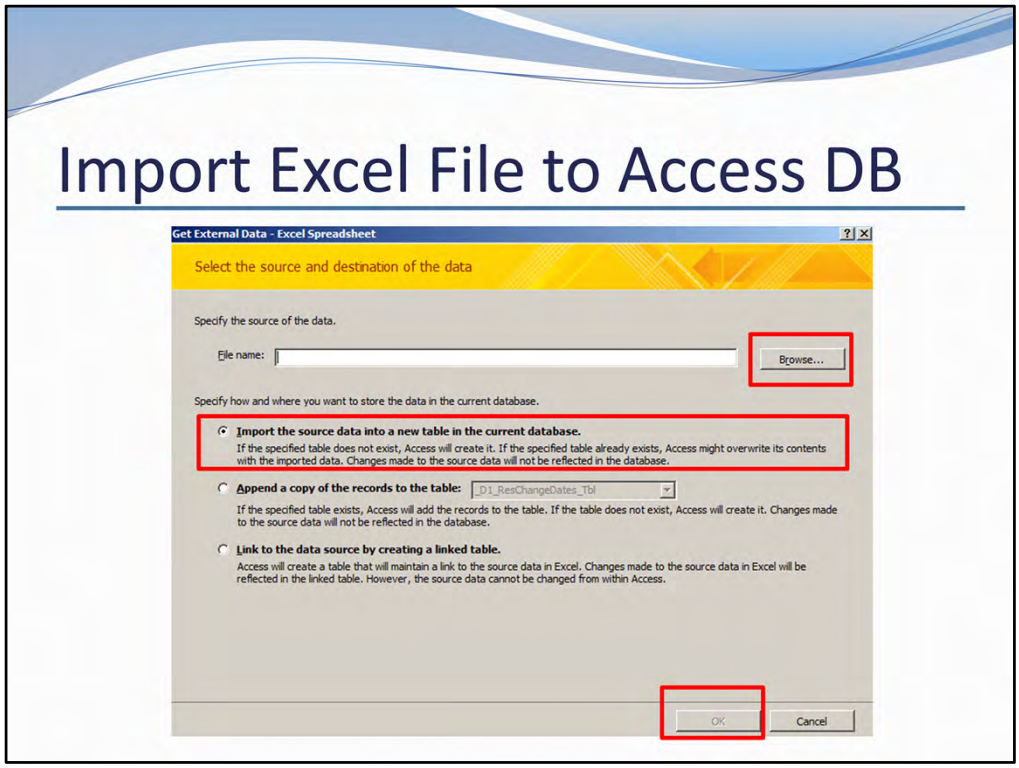
The Microsoft Excel file displayed in this slide defines the following groupings of dates. Import this file as a new table in a Microsoft Access database to assist in aggregating and summarizing data based on any date field in the FSP DCR data.

Date Groupings Defined

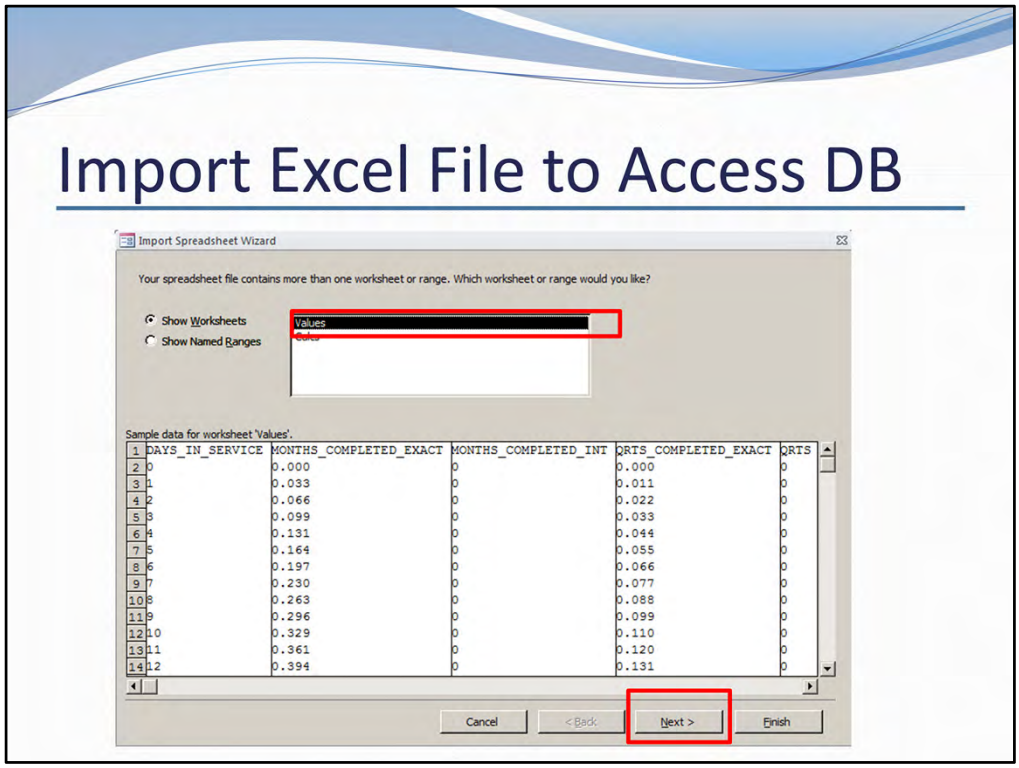
1. Month Number – Month Number in Year (1 to 12)
2. Month Name – Name of Month (Jan – Dec)
3. Day of Month – (1 to 31)
4. Year Number – Four digit year (1984 to 2024)
5. Month and Day – Formatted as Month/Day (1/1 to 12/31)
6. Day of Week – Weekday Number Starting on Sunday (1 to 7)
7. Weekend or Weekday – Flag for Weekend or Weekday (Weekend, Weekday)
8. Fiscal Year (FY) – Fiscal Year Formatted as Year/Year (1984/1985 to 2024/2025)
9. Calendar Year (CY) Quarter (QRT) – (1 to 4)
10. FY Qrt – (1 to 4)
11. CY and QRT – Formatted as Year_Q# (1985_Q1 to 2024_Q4)
12. FY and QRT – Formatted as FY_Q# (1984/1985_Q3 to 2024/2025_Q2)



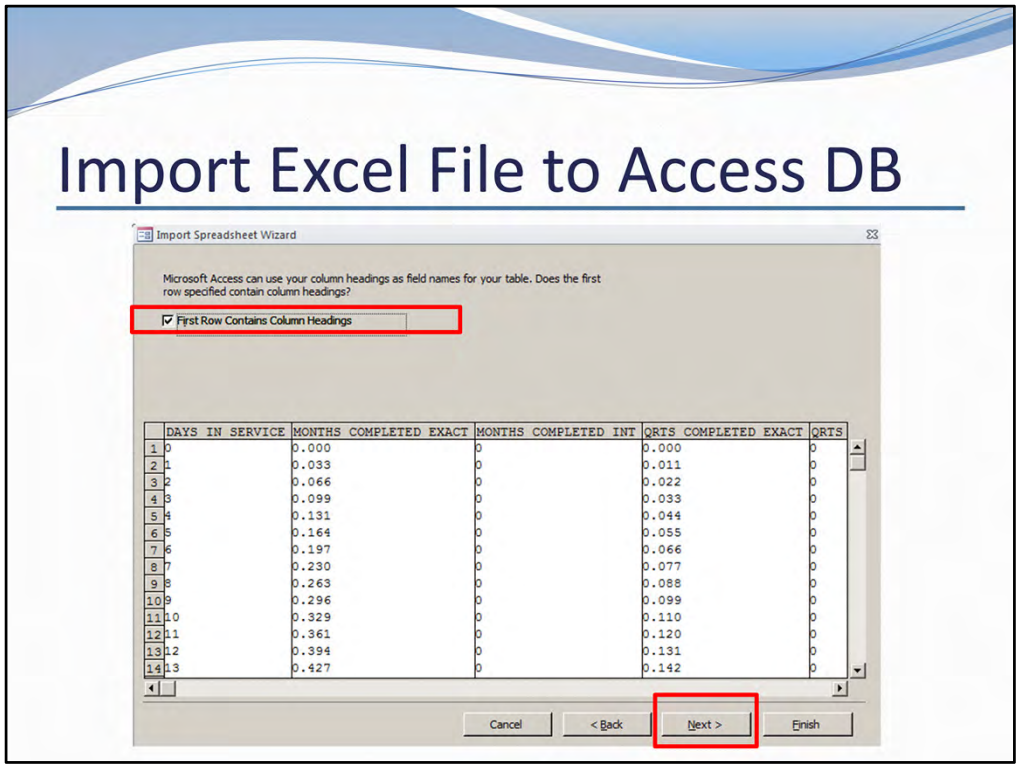
After saving the Timeframe and Date Dimension tables to a location on your network, open the PLD Templates and select the **External Data** menu item and then the **Excel** button to begin the import process.


Import Excel File to Access DB
Get External Data - Excel Spreadsheet
Select the source and destination of the data
Specify the source of the data.
File name:
Browse...
Specify how and where you want to store the data in the current database.
Import the source data into a new table in the current database.
If the specified table does not exist, Access will create it. If the specified table already exists, Access might overwrite its contents with the imported data. Changes made to the source data will not be reflected in the database.
Append a copy of the records to the table:
D1_ResChangeDates_Tbl
If the specified table exists, Access will add the records to the table. If the table does not exist, Access will create it. Changes made to the source data will not be reflected in the database.
Link to the data source by creating a linked table.
Access will create a table that will maintain a link to the source data in Excel. Changes made to the source data in Excel will be reflected in the linked table. However, the source data cannot be changed from within Access.
OK
Cancel

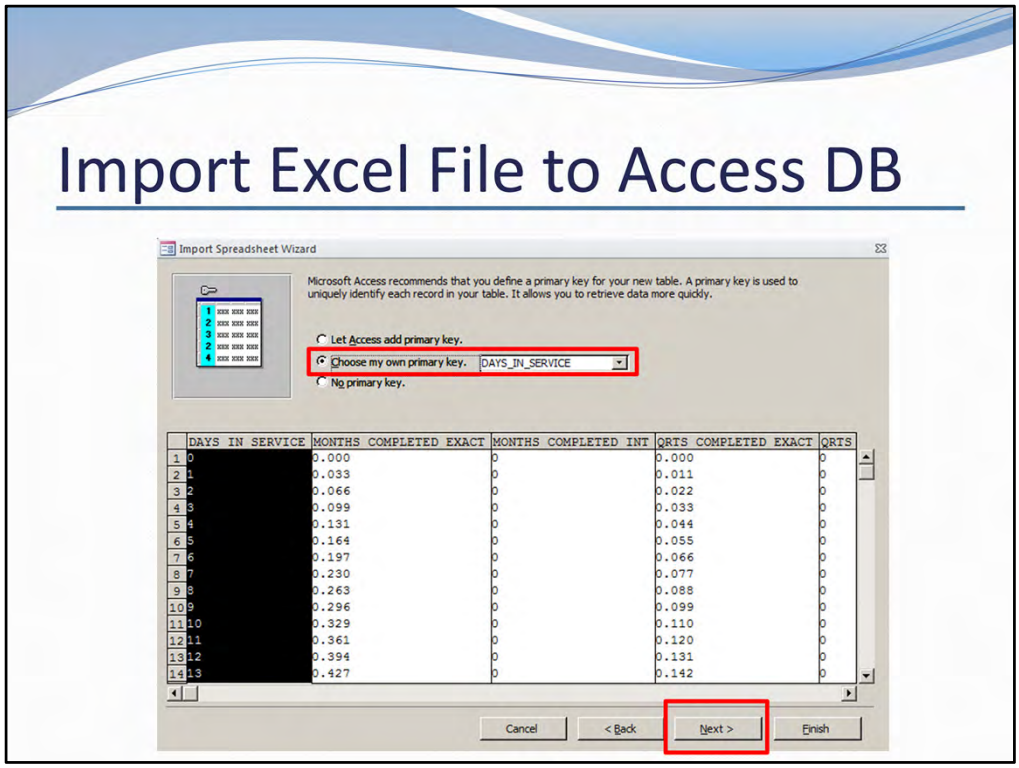
Select **Browse** to locate the Excel file. Select to **Import the source data into a new table in the current database**. Select **OK**.


Import Excel File to Access DB
Import Spreadsheet Wizard
Your spreadsheet file contains more than one worksheet or range. Which worksheet or range would you like?
Show Worksheets
Show Named Ranges
Values
Sample data for worksheet 'Values'.
DAYS_IN_SERVICE MONTHS_COMPLETED_EXACT MONTHS_COMPLETED_INT QRTS_COMPLETED_EXACT QRTS
0 0.000 0 0.000 0
1 0.033 0 0.011 0
2 0.066 0 0.022 0
3 0.099 0 0.033 0
4 0.131 0 0.044 0
5 0.164 0 0.055 0
6 0.197 0 0.066 0
7 0.230 0 0.077 0
8 0.263 0 0.088 0
9 0.296 0 0.099 0
10 0.329 0 0.110 0
11 0.361 0 0.120 0
12 0.394 0 0.131 0
Cancel
< Back
Next >
Finish

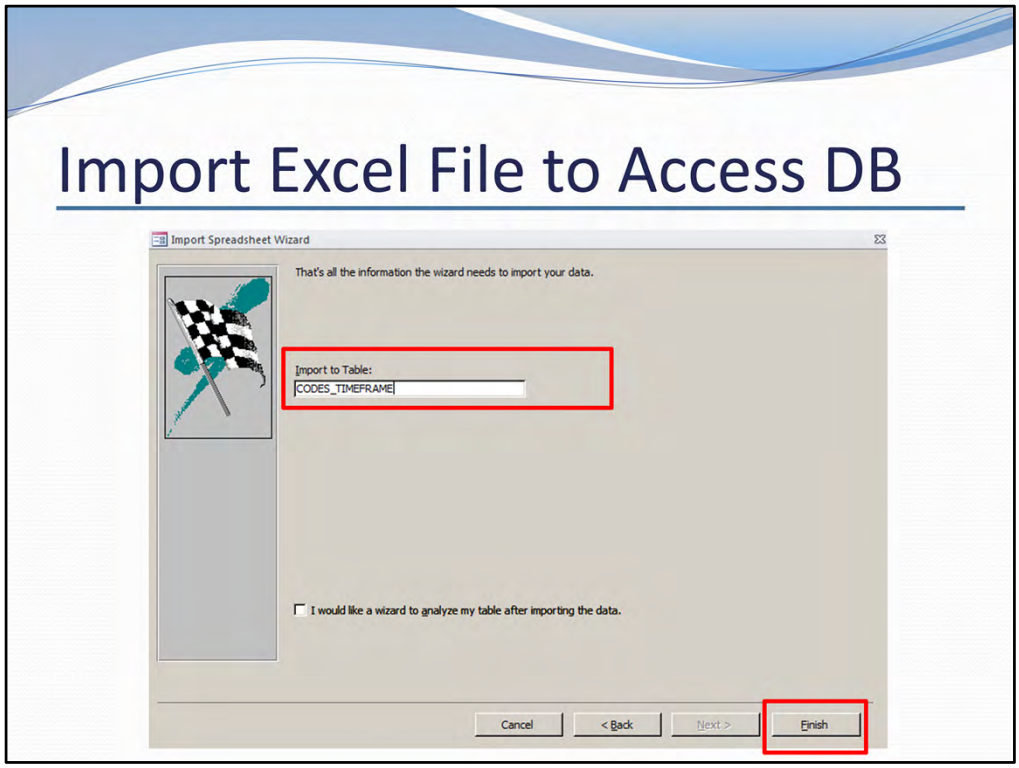
Select the worksheet, and select **Next**.


Import Excel File to Access DB
Import Spreadsheet Wizard
Microsoft Access can use your column headings as field names for your table. Does the first row specified contain column headings?
First Row Contains Column Headings
DAYS IN SERVICE | MONTHS COMPLETED EXACT | MONTHS COMPLETED INT | QRTS COMPLETED EXACT | QRTS
0 | 0.000 | 0 | 0.000 | 0
1 | 0.033 | 0 | 0.011 | 0
2 | 0.066 | 0 | 0.022 | 0
3 | 0.099 | 0 | 0.033 | 0
4 | 0.131 | 0 | 0.044 | 0
5 | 0.164 | 0 | 0.055 | 0
6 | 0.197 | 0 | 0.066 | 0
7 | 0.230 | 0 | 0.077 | 0
8 | 0.263 | 0 | 0.088 | 0
9 | 0.296 | 0 | 0.099 | 0
10 | 0.329 | 0 | 0.110 | 0
11 | 0.361 | 0 | 0.120 | 0
12 | 0.394 | 0 | 0.131 | 0
13 | 0.427 | 0 | 0.142 | 0
Cancel
< Back
Next >
Finish

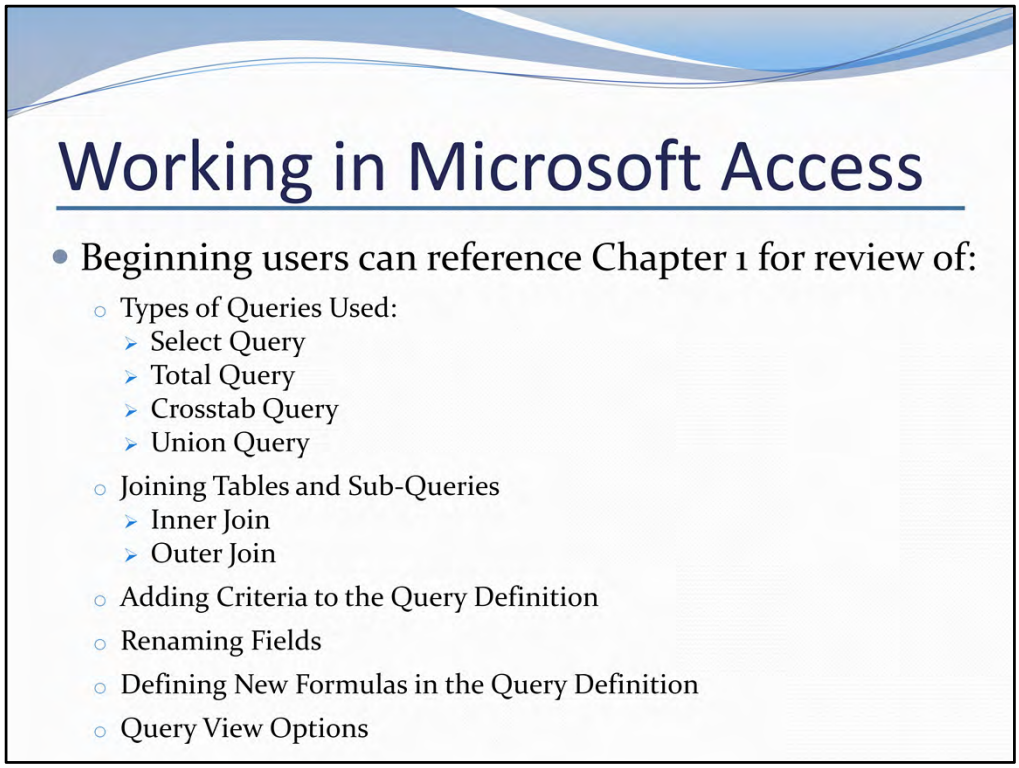
Check the **First Row Contains Column Headings**, and select **Next**. Select **Next** again on the next screen.


Import Excel File to Access DB
Import Spreadsheet Wizard
Microsoft Access recommends that you define a primary key for your new table. A primary key is used to uniquely identify each record in your table. It allows you to retrieve data more quickly.
Let Access add primary key.
Choose my own primary key.
DAYS_IN_SERVICE
No primary key.
DAYS IN SERVICE | MONTHS COMPLETED EXACT | MONTHS COMPLETED INT | QRTS COMPLETED EXACT | QRTS
0 | 0.000 | 0 | 0.000 | 0
1 | 0.033 | 0 | 0.011 | 0
2 | 0.066 | 0 | 0.022 | 0
3 | 0.099 | 0 | 0.033 | 0
4 | 0.131 | 0 | 0.044 | 0
5 | 0.164 | 0 | 0.055 | 0
6 | 0.197 | 0 | 0.066 | 0
7 | 0.230 | 0 | 0.077 | 0
8 | 0.263 | 0 | 0.088 | 0
9 | 0.296 | 0 | 0.099 | 0
10 | 0.329 | 0 | 0.110 | 0
11 | 0.361 | 0 | 0.120 | 0
12 | 0.394 | 0 | 0.131 | 0
13 | 0.427 | 0 | 0.142 | 0
Cancel
< Back
Next >
Finish

Select to **Choose my own primary key** and select the field **DAYS_IN_SERVICE** from the drop-down menu. Select **Next**.


Import Excel File to Access DB
Import Spreadsheet Wizard
That's all the information the wizard needs to import your data.
Import to Table:
CODES_TIMEFRAME
I would like a wizard to analyze my table after importing the data.
Cancel
< Back
Next >
Finish

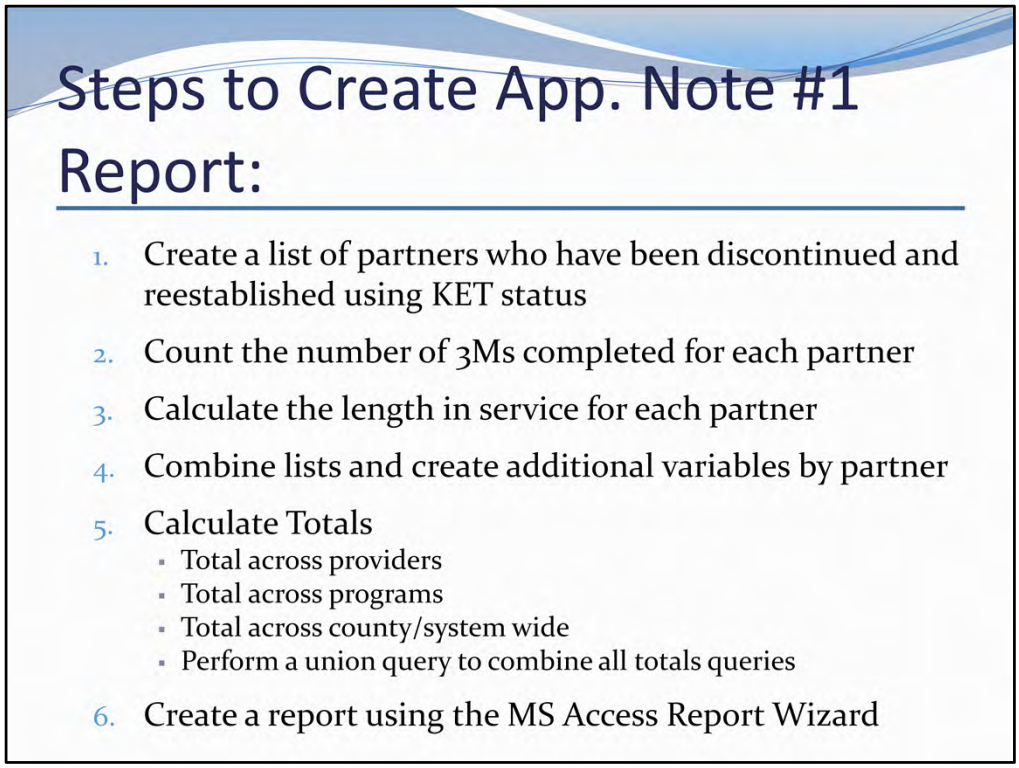
In the **Import to Table** box, type the table name: CODES_TIMEFRAME or CODES_DATES for the appropriate file. Select **Finish**. The table is now imported into the PLD templates.



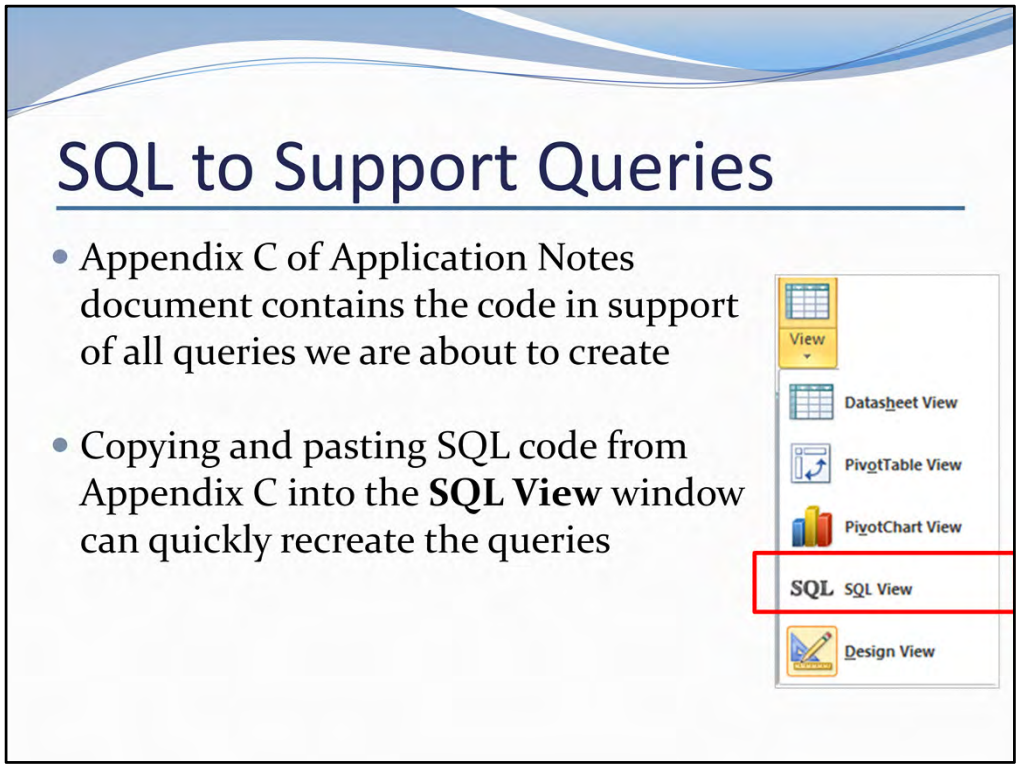
The step-by-step instructions in these Application Notes are designed as a simplified modular approach to utilizing Microsoft Access for beginning users.

The step-by-step instructions for the Application Notes assume the users have some basic knowledge of Microsoft Access.

These topics will be covered during the process of creating the reports in this presentation. Refer to the Application Notes (completed 4/5/2012) at Chapter 1 and section “Working in Microsoft Access” on page 8 as a concise reference for these topics.

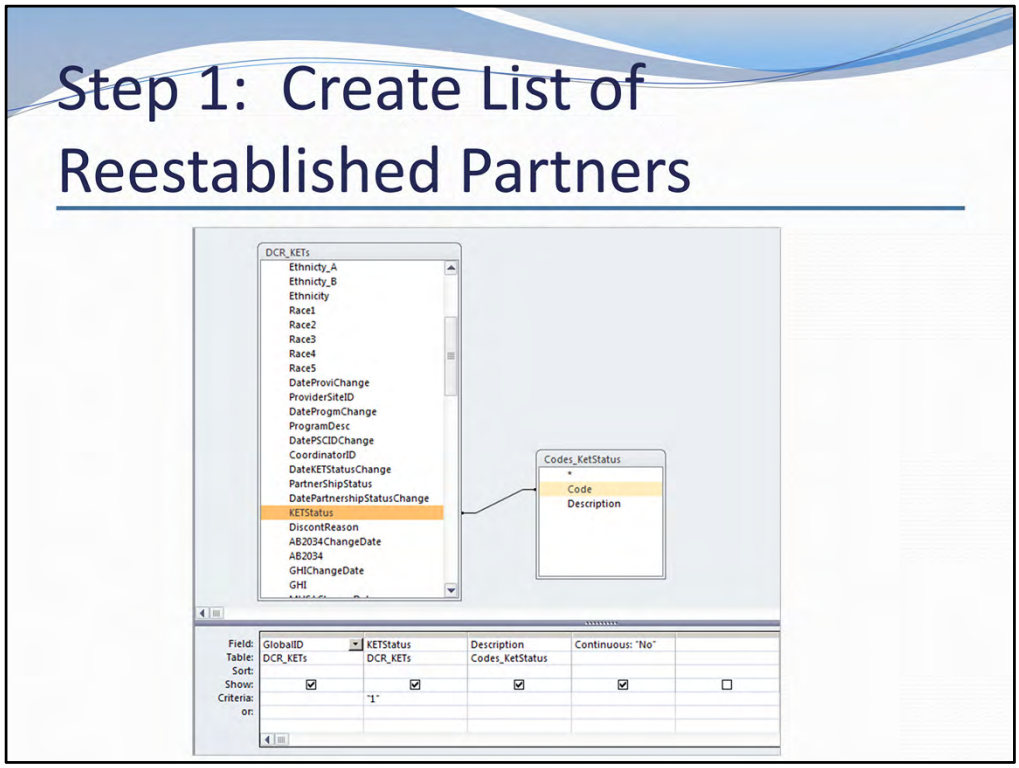

Steps to Create App. Note #1 Report:
1. Create a list of partners who have been discontinued and reestablished using KET status
2. Count the number of 3Ms completed for each partner
3. Calculate the length in service for each partner
4. Combine lists and create additional variables by partner
5. Calculate Totals
▪ Total across providers
▪ Total across programs
▪ Total across county/system wide
▪ Perform a union query to combine all totals queries
6. Create a report using the MS Access Report Wizard

Once the Microsoft Access database contains the building blocks described previously in this section, the report can be constructed through the six steps listed in this slide.


SQL to Support Queries
Appendix C of Application Notes document contains the code in support of all queries we are about to create
Copying and pasting SQL code from Appendix C into the SQL View window can quickly recreate the queries
View
Datasheet View
PivotTable View
PivotChart View
SQL View
Design View

Appendix C from the Application Notes document provides the Microsoft Access SQL code for all of the queries created in the Application Notes. The SQL code assumes the user is utilizing the PLD Templates database offered by the MHSOAC. This code also assumes the user has imported the CODES_TIMEFRAME (from Appendix A) and the CODES_DATES (from Appendix B) tables into the PLD Templates.

Copying and pasting this code into the SQL view of an empty Microsoft Access query within the PLD Templates will quickly recreate the queries designed in these Application Notes. This code is provided for user convenience in testing and troubleshooting or recreating the design of the queries.



The first step for this report is to create a list of all of the partners who were discontinued and reestablished for the same partnership. These partners will be counted as “No” in the **Continuously Enrolled?** column of the report. Partners not included in this list will be counted as “Yes” for that column.

1. With the PLD Templates open in Microsoft Access, select **Create > Query Design**.

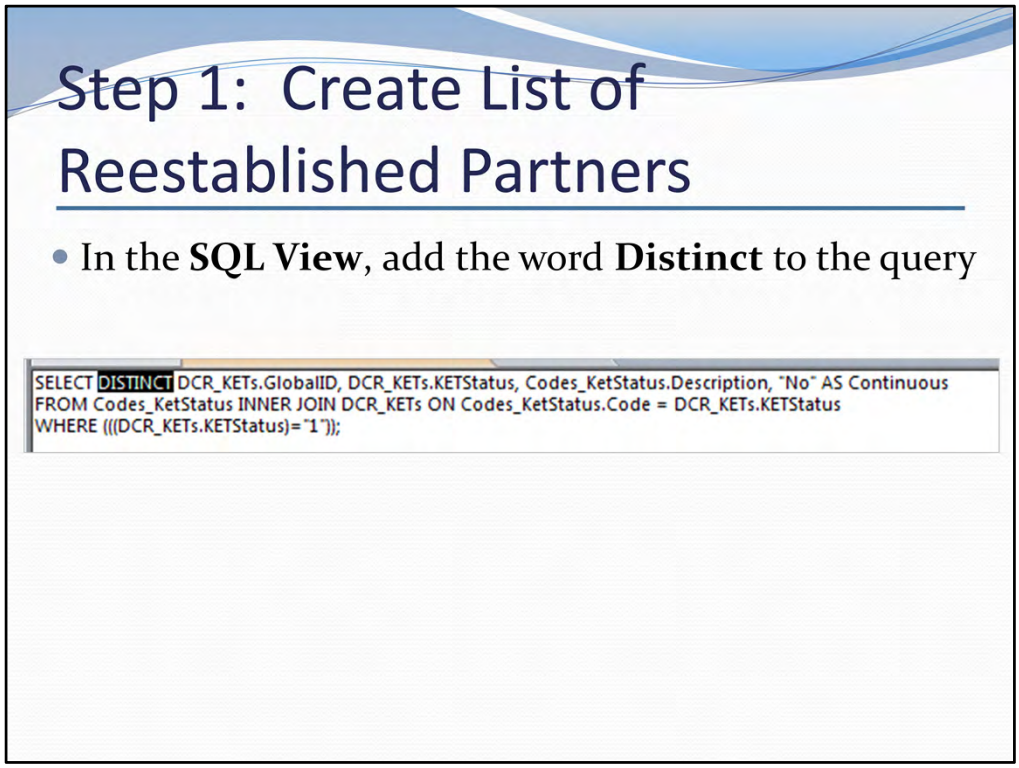
2. In the **Show Tables** pop-up window, select and add the following two tables to the query: **DCR_KETs**, **Codes_KetStatus**. Then select the **Close** button.

3. As seen in this slide, select the **[KETStatus]** field within the **DCR_KETs** table, and drag and drop the field onto the **[Code]** field of the **Codes_KetStatus** table to create an inner join between the tables.

4. As seen in this slide, add the **DCR_KETS.[GlobalID], DCR_KETS.[KETStatus]**, **Codes_KetStatus.[Description]** fields to the query definition spreadsheet.

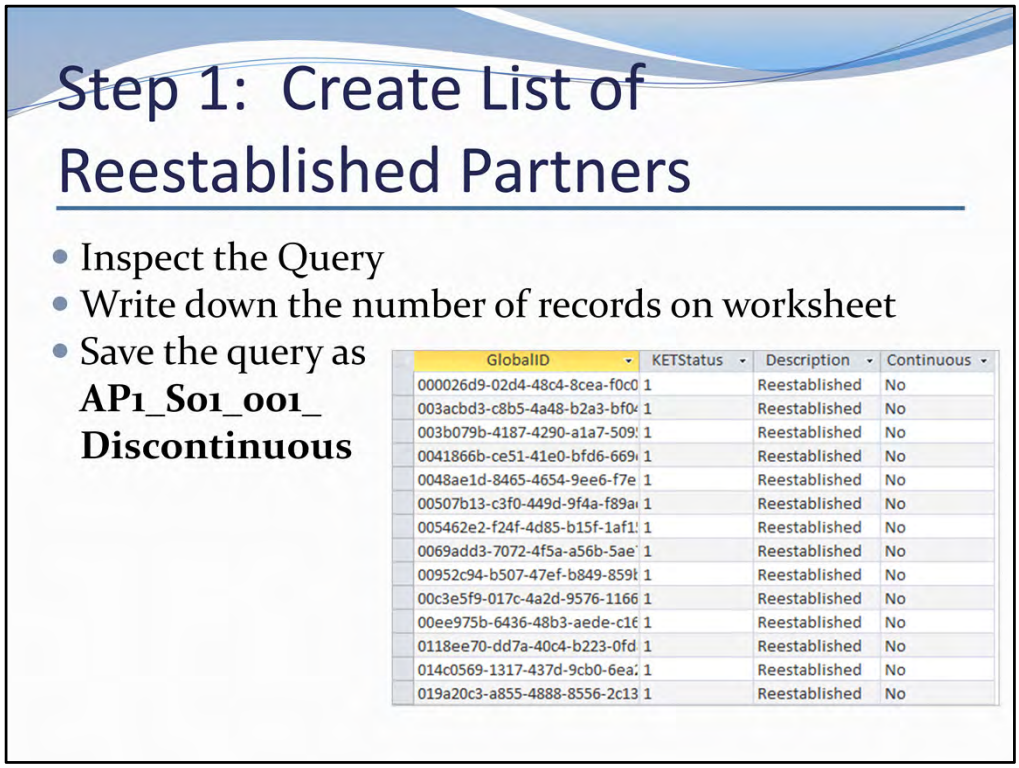
5. As seen in this slide, create a fourth variable by typing the following into a blank column of the query design: **Continuous: “No”**. This will create a variable in the query named **[Continuous]** and assign the value **“No”** to all records.

6. As seen in this slide, add the criteria of “1” to the **[KETStatus]** field of the query. This will limit the criteria to pull back only those records in which a partnership was reestablished.

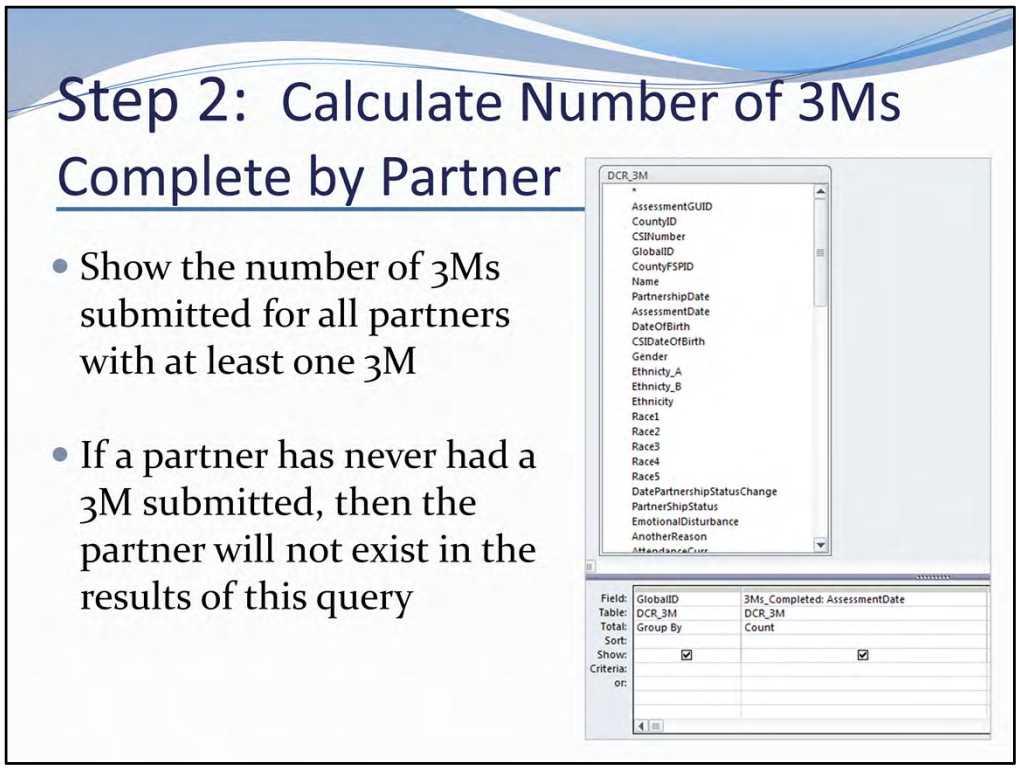

Step 1: Create List of Reestablished Partners
In the SQL View, add the word Distinct to the query
SELECT DISTINCT DCR_KETs.GlobalID, DCR_KETs.KETStatus, Codes_KetStatus.Description, "No" AS Continuous
FROM Codes_KetStatus INNER JOIN DCR_KETs ON Codes_KetStatus.Code = DCR_KETs.KETStatus
WHERE (((DCR_KETs.KETStatus)="1"));

Running the query now will bring back all KET records for a reestablishment activity. A partnership may have been discontinued and reestablished multiple times. However, we only want a list of unique partnership identifiers for partnerships with any reestablishment activity, regardless of how many times it occurred. Therefore, to remove duplicates, we will choose to select distinct records.

As seen in this slide, move to the **SQL View** and insert the word **DISTINCT** after the word **SELECT**. This will remove any duplicate rows from our query, resulting in one record per **[GlobalID]** with a **[KETStatus]** equal to “1”.

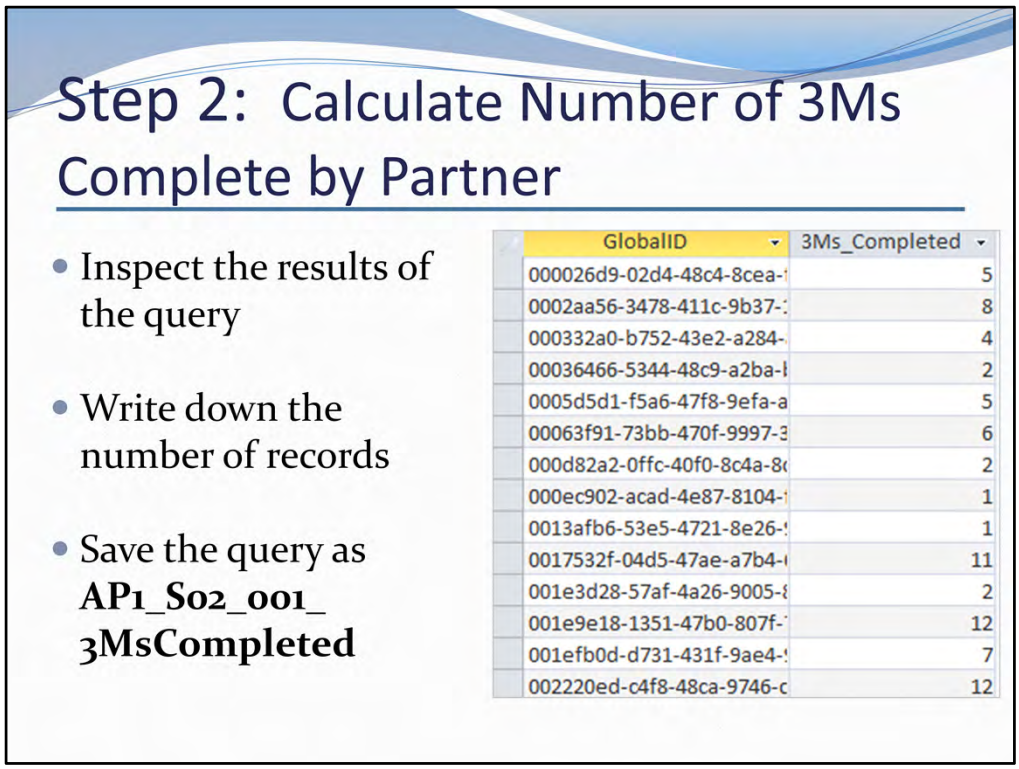


As seen in this slide, move to the datasheet view to inspect the results of the query. Write down the number of records (i.e., partnerships ever discontinued and reestablished) on the worksheet from Appendix D of the Application Notes document as reference. Save the query as **AP1_S01_001_Discontinuous**.

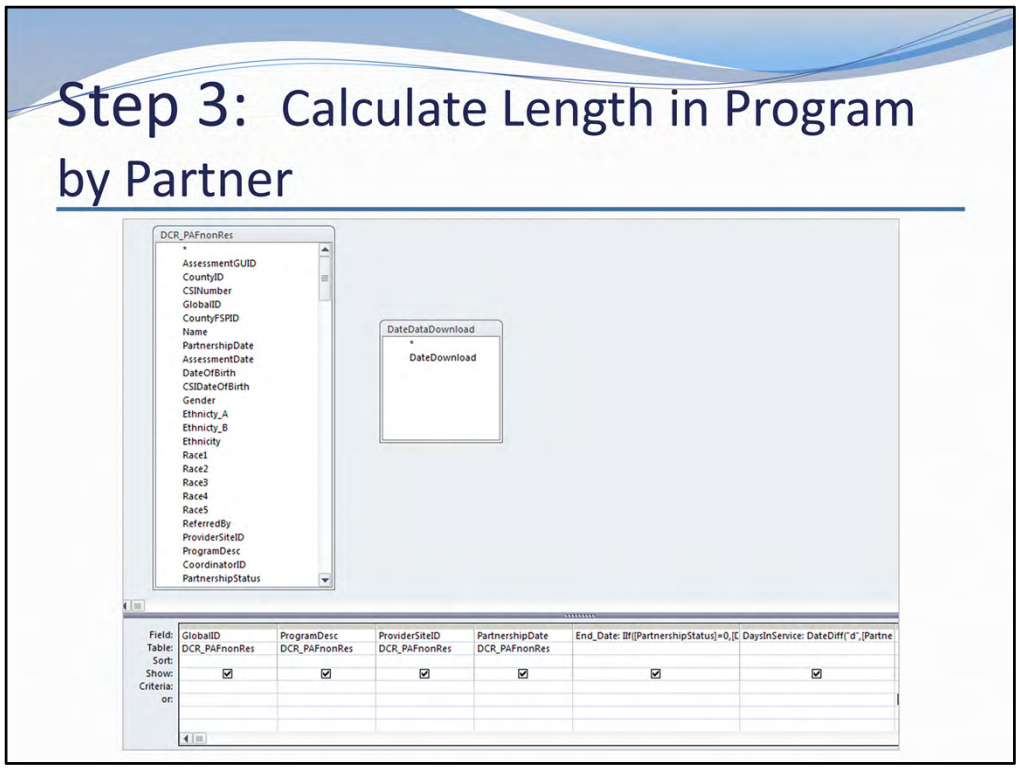


Step 2 involves calculating the number of 3Ms ever submitted for each partner. If a partner has never had a 3M submitted, then the partner will not exist in the results of this query. This query will show the number of 3Ms submitted for all partners with at least one 3M.

1. With the PLD Templates open in Microsoft Access, select **Create > Query Design**.
2. In the **Show Tables** pop-up window, select and add the following table to the query: **DCR_3M** table. Then select the **Close** button.
3. Right click in the query definition datasheet in the bottom half of the window and choose to add a **Total** row to the query definition.
4. As seen in this slide, add the **[GlobalID]** and choose Group By from the drop-down selections in the **Total** row.
5. As seen in this slide, add the **[AssessmentDate]** field to the query. Select the **Count** operator from the **Total** row drop-down box. Rename the field by typing **3Ms_Completed:** in front of the original field name.



As seen in this slide, move to the datasheet view to inspect the results of the query. Write down the number of records (i.e., partnerships with at least one or more 3Ms) on the worksheet from Appendix D of the Application Notes document as reference. Save the query as **AP1_S02_001_3MsCompleted.**



Step 3 involves calculating the number of days a partnership existed. Some partnerships may have been discontinued, and some may still be active. Therefore, for active partnerships, you will need to identify an end date for the calculation. The end date is usually determined as the end date defined when the CSV files was extracted from the FSP DCR.. The extraction is a static snapshot of all of the partnerships up to the date of extraction.

1. With the PLD Templates open in Microsoft Access, select **Create > Query Design**.

2. In the **Show Tables** pop-up window, select and add the following tables to the query: **DCR_PAFnonRes** and the **DateDataDownload** table. Then select the **Close** button. Do not join the tables.

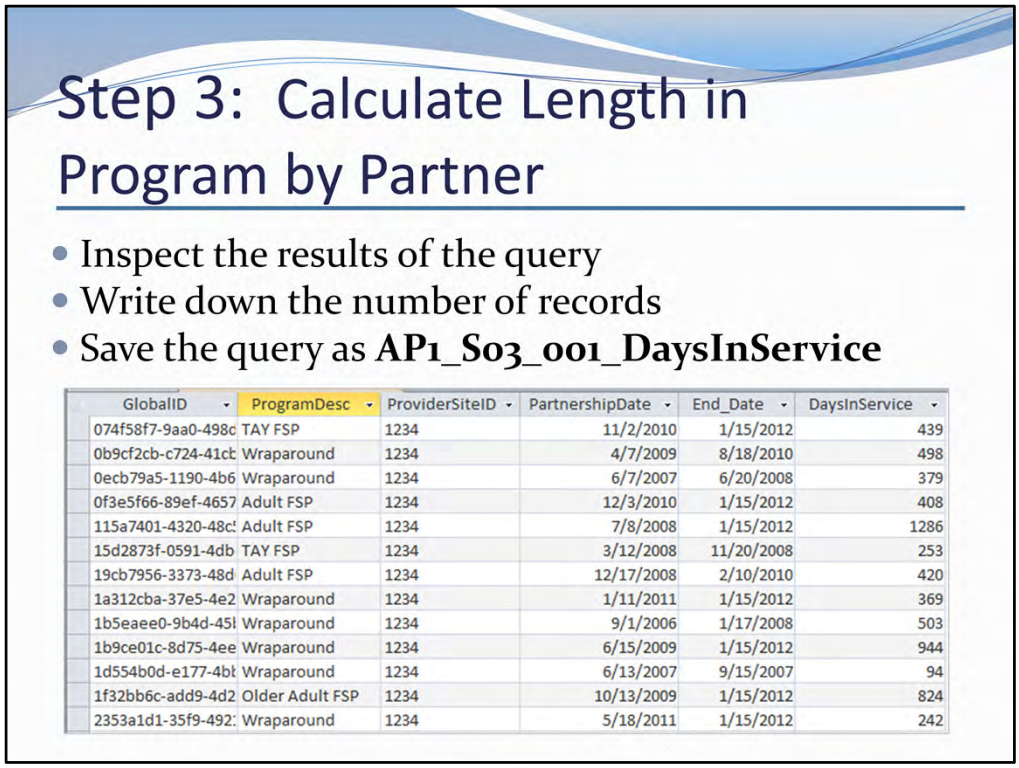
3. As seen in this slide, select and add the following fields to add to the query: **DCR_PAFnonRes.[GlobalID], DCR_PAFnonRes.[ProgramDesc], DCR_PAFnonRes.[ProviderSiteID], DCR_PAFnonRes.[PartnershipDate]**.

4. If the **DCR_PAFnonRes.[PartnershipStatus]** = 0, then the partnership is currently discontinued, and the date the partnership was discontinued is stored in the **DCR_PAFnonRes.[DatePartnershipStatusChange]** field. Otherwise, the partnership is active, and the end date defined when the CSV files was extracted should be used to calculate the length of partnership. As seen in this slide, select an empty column of the query definition datasheet, and enter the following formula to identify the correct end date

to use when calculating the length of partnership.
End_Date: IIf([PartnershipStatus]=0, [DatePartnershipStatusChange], [DateDataDownload].[DateDownload])

5. Now, calculate the length the partnership was in service by counting the number of days between the partnership start date and the end date. As seen in this slide, select an empty column of the query definition datasheet, and enter the following formula to calculate the number of days the partnership existed.
DaysInService: DateDiff("d",[PartnershipDate],[End_Date])

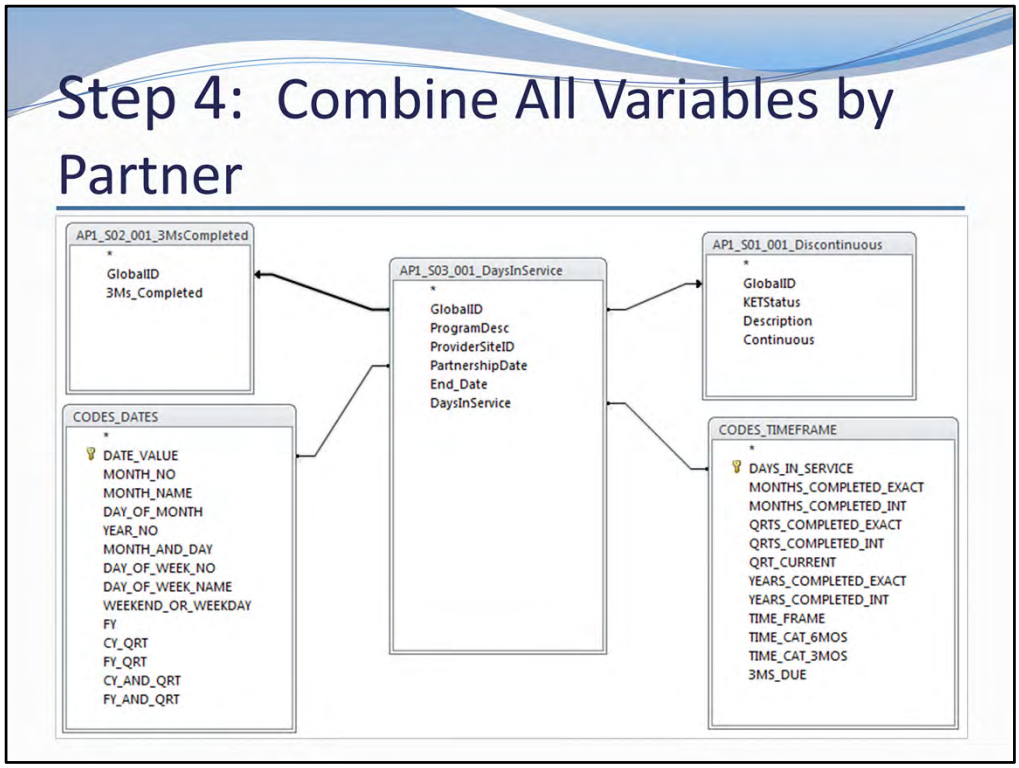
Note: **DateDiff** is a MS Access function which helps calculate the difference between two dates. The function takes three parameters. The first parameter, “d”, defines the calculation should return the number of days. The second parameter is the start date for the calculation, and the third parameter is the end date for the calculation.


Step 3: Calculate Length in Program by Partner
Inspect the results of the query
Write down the number of records
Save the query as AP1_S03_001_DaysInService

GlobalID	ProgramDesc	ProviderSiteID	PartnershipDate	End_Date	DaysInService
074f58f7-9aa0-498c	TAY FSP	1234	11/2/2010	1/15/2012	439
0b9cf2cb-c724-41cb	Wraparound	1234	4/7/2009	8/18/2010	498
0ecb79a5-1190-4b6	Wraparound	1234	6/7/2007	6/20/2008	379
0f3e5f66-89ef-4657	Adult FSP	1234	12/3/2010	1/15/2012	408
115a7401-4320-48c	Adult FSP	1234	7/8/2008	1/15/2012	1286
15d2873f-0591-4db	TAY FSP	1234	3/12/2008	11/20/2008	253
19cb7956-3373-48d	Adult FSP	1234	12/17/2008	2/10/2010	420
1a312cba-37e5-4e2	Wraparound	1234	1/11/2011	1/15/2012	369
1b5eaee0-9b4d-45l	Wraparound	1234	9/1/2006	1/17/2008	503
1b9ce01c-8d75-4ee	Wraparound	1234	6/15/2009	1/15/2012	944
1d554b0d-e177-4bl	Wraparound	1234	6/13/2007	9/15/2007	94
1f32bb6c-add9-4d2	Older Adult FSP	1234	10/13/2009	1/15/2012	824
2353a1d1-35f9-492	Wraparound	1234	5/18/2011	1/15/2012	242

Move to the datasheet view to inspect the results of the query. Write down the number of records (i.e., total number of partnerships) on the worksheet from Appendix D of the Application Notes document as reference.

Save the query as **AP1_S03_001_DaysInService.**



Step 4 involves joining information from all of the previously created queries. This query will result in one record per partner.

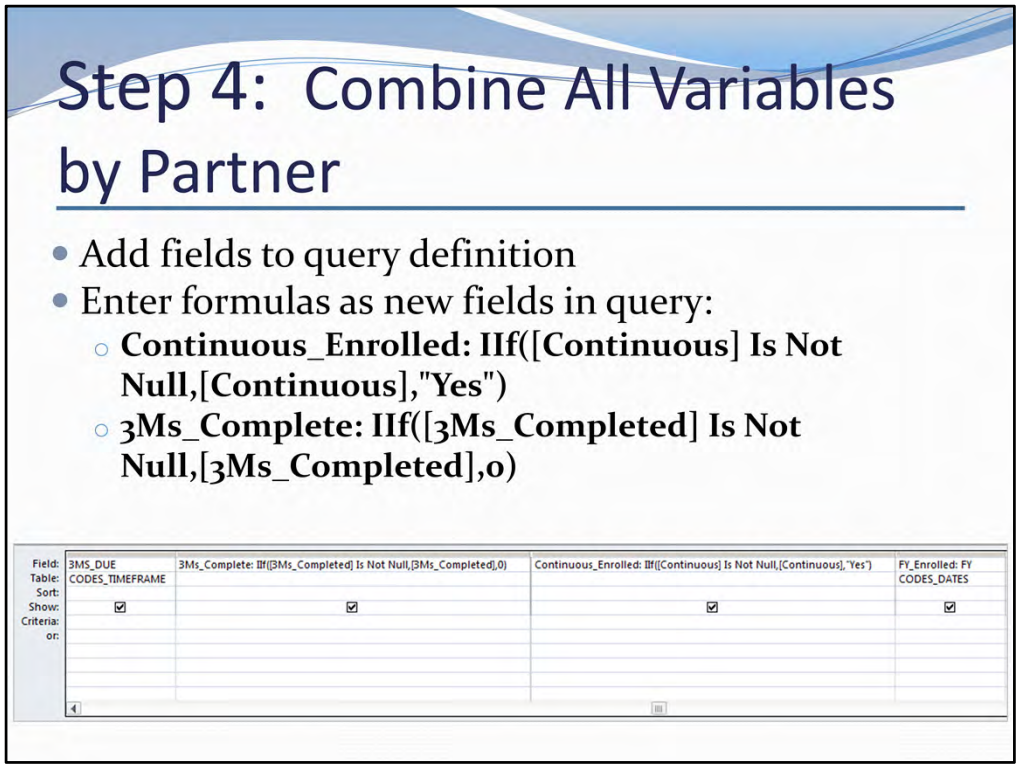
1. With the PLD Templates open in Microsoft Access, select **Create > Query Design**.

2. In the **Show Tables** pop-up window, select and add the following two tables from the Tables tab: **CODES_TIMEFRAME**, **CODES_DATES**. Select the **Queries** tab and add the following three queries: **AP1_S03_001_DaysInService, AP1_S02_001_3MsCompleted**, **AP1_S01_001_Discontinuous**. Then select the **Close** button.

3. As seen in this slide, create the following joins between the five tables/queries:

• Inner join between **AP1_S03_001_DaysInService.[PartnershipDate]** and **CODES_DATE.[DATE_VALUE]**
• Inner join between **AP1_S03_001_DaysInService. [DaysInService]** and **CODES_TIMEFRAME.[DAYS_IN_SERVICE]**
• Outer join from **AP1_S03_001_DaysInService.[GlobalID]** to **AP1_S02_001_3MsCompleted.[GlobalID]**
• Outer join from **AP1_S03_001_DaysInService.[GlobalID]** to **AP1_S01_001_Discontinuous.[GlobalID]**

After you have created a join on two fields, right click on the line indicating the join and change it to an outer join (as indicated by a directional arrow) as needed.



4. Add all of the fields from the **AP1_S03_001_DaysInService** to the query definition.

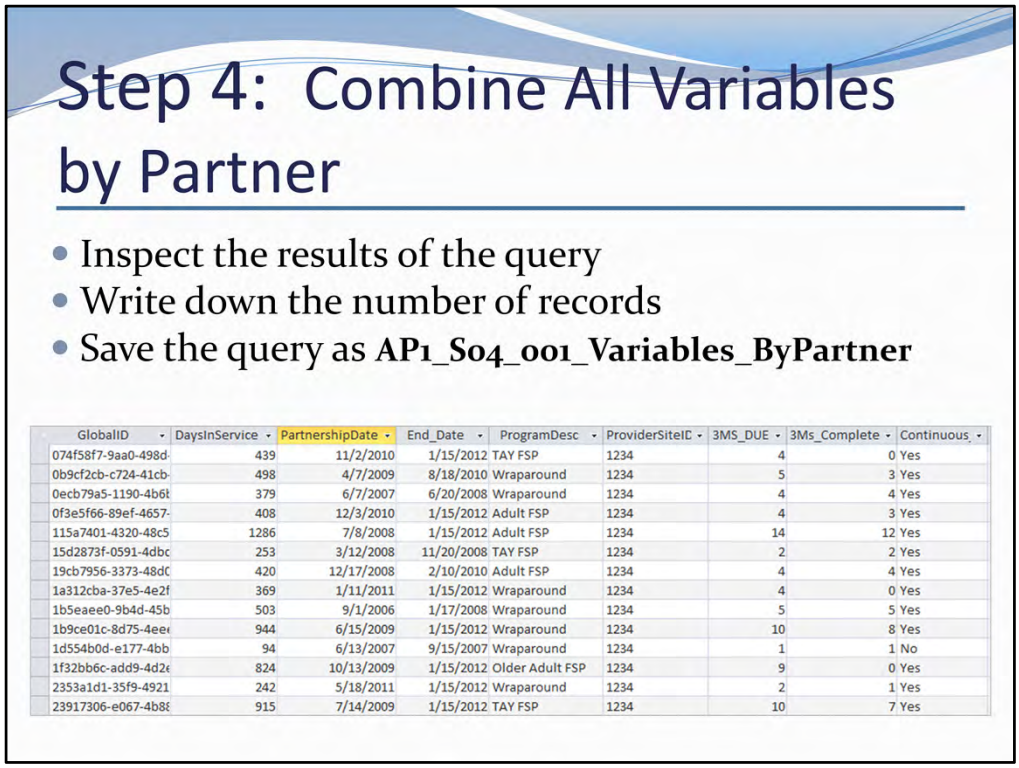
5. Add the **CODES_TIMEFRAME.[3MS_DUE]** field.

Note: Optionally, add any other fields from the **CODES_DATE** table, such as **[FY_AND_QRT]** (i.e., fiscal year and quarter) by which you may later want to aggregate the data.

6. Identify the partners who were not continuously enrolled, and set the remaining partners to “Yes” for the **[Continuous]** field. Select an empty column of the query definition datasheet, and enter the following formula to identify continuous or discontinuous partnerships.

Continuous_Enrolled: IIf([Continuous] Is Not Null,[Continuous],"Yes")

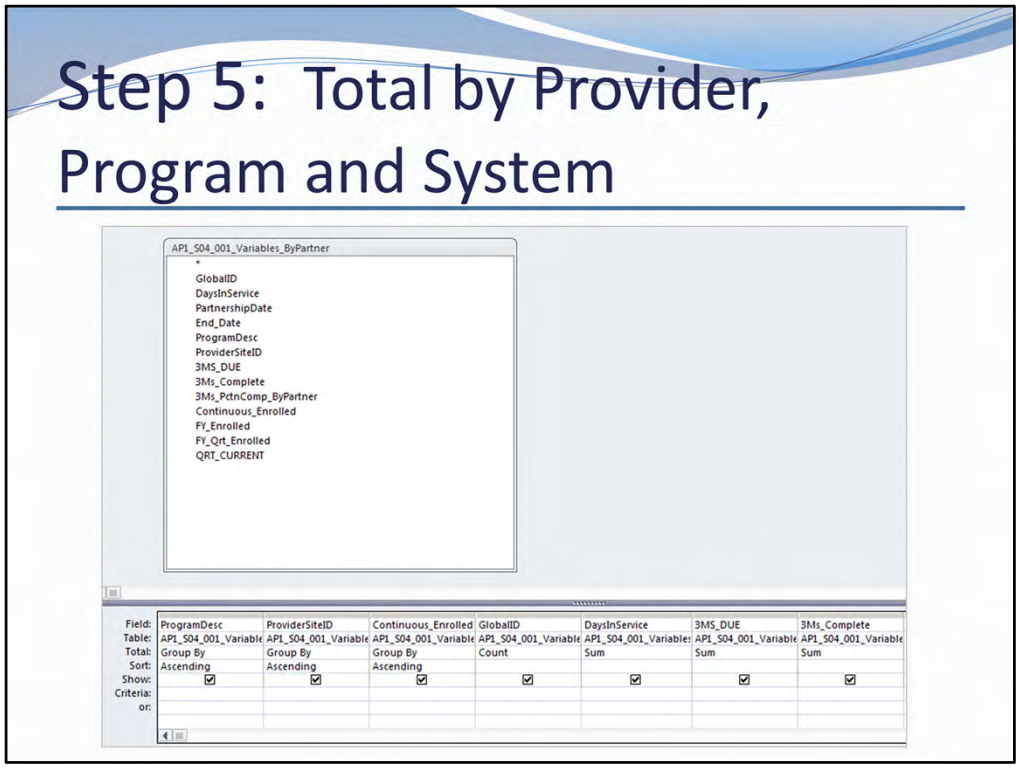
7. Now, you will need to select the number of 3Ms completed, which was previously calculated for partnerships with at least one 3M completed. However, some partners may not have had a 3M completed, and a formula will need to set the value for this variable to zero for these partnerships. Select an empty column of the query definition datasheet, and enter the following formula to set the number of 3Ms completed for all partnerships.
3Ms_Complete: IIf([3Ms_Completed] Is Not Null,[3Ms_Completed],0)


Step 4: Combine All Variables by Partner
Inspect the results of the query
Write down the number of records
Save the query as AP1_S04_001_Variables_ByPartner

GlobalID	DaysInService	PartnershipDate	End_Date	ProgramDesc	ProviderSiteID	3MS_DUE	3Ms_Complete	Continuous
074f58f7-9aa0-498d	439	11/2/2010	1/15/2012	TAY FSP	1234	4	0	Yes
0b9cf2cb-c724-41cb	498	4/7/2009	8/18/2010	Wraparound	1234	5	3	Yes
0ecb79a5-1190-4b6t	379	6/7/2007	6/20/2008	Wraparound	1234	4	4	Yes
0f3e5f66-89ef-4657-	408	12/3/2010	1/15/2012	Adult FSP	1234	4	3	Yes
115a7401-4320-48c5	1286	7/8/2008	1/15/2012	Adult FSP	1234	14	12	Yes
15d2873f-0591-4dbc	253	3/12/2008	11/20/2008	TAY FSP	1234	2	2	Yes
19cb7956-3373-48d0	420	12/17/2008	2/10/2010	Adult FSP	1234	4	4	Yes
1a312cba-37e5-4e2f	369	1/11/2011	1/15/2012	Wraparound	1234	4	0	Yes
1b5eaee0-9b4d-45b	503	9/1/2006	1/17/2008	Wraparound	1234	5	5	Yes
1b9ce01c-8d75-4ee	944	6/15/2009	1/15/2012	Wraparound	1234	10	8	Yes
1d554b0d-e177-4bb	94	6/13/2007	9/15/2007	Wraparound	1234	1	1	No
1f32bb6c-add9-4d2	824	10/13/2009	1/15/2012	Older Adult FSP	1234	9	0	Yes
2353a1d1-35f9-4921	242	5/18/2011	1/15/2012	Wraparound	1234	2	1	Yes
23917306-e067-4b8	915	7/14/2009	1/15/2012	TAY FSP	1234	10	7	Yes

Move to the datasheet view to inspect the results of the query. Write down the number of records (i.e., total number of partnerships) on the worksheet from Appendix D of the Application Notes document as reference. The number of records in this query should match the number of records in the **AP1_S03_001_DaysInService** query.

Save the query as **AP1_S04_001_Variables_ByPartner.**



Step 5 involves aggregating the data from step 4 into summaries by provider, program and the entire system (i.e., county).

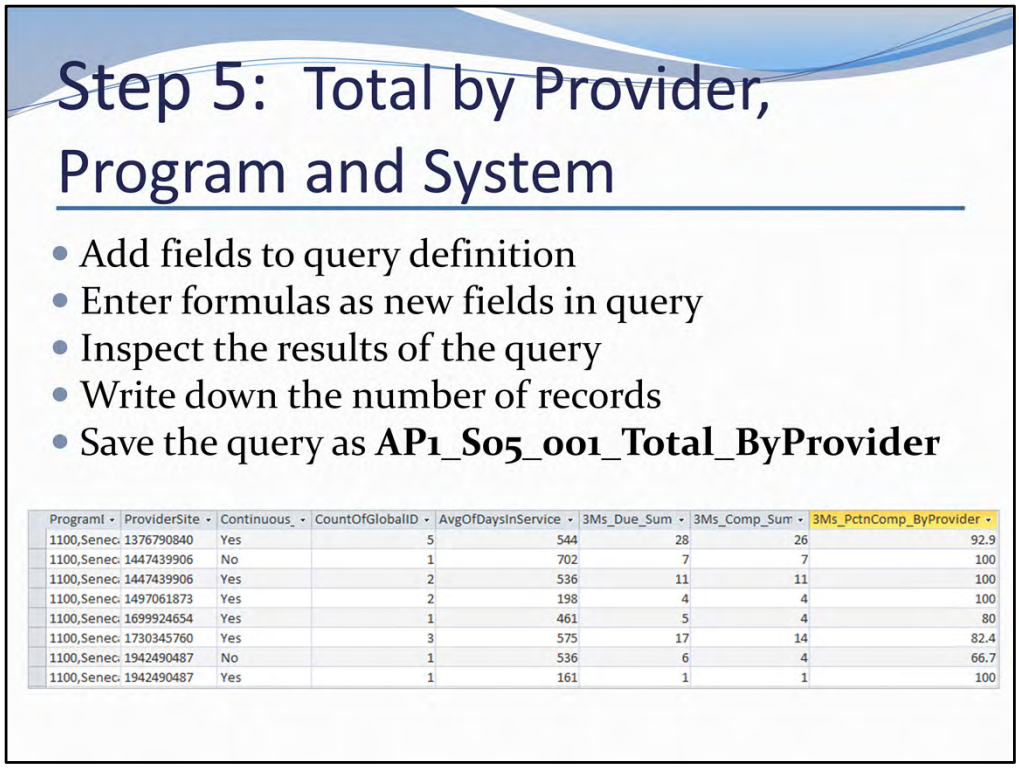
1. With the PLD Templates open in Microsoft Access, select **Create > Query Design**.

2. In the **Show Tables** pop-up window, select the **Queries** tab and then select and add the query from previous step: **AP1_S04_001_Variables_ByPartner**. Then select the **Close** button.

3. Right click in the query definition spreadsheet, and add the **Total** row to the query definition.

4. As seen in this slide, add the following variables, and select the following operator in the **Total** row.

[ProgramDesc] Group By
[ProviderSiteID] Group By
[Continuous_Enrolled] Group By
[GlobalID] Count
[DaysInService] Avg
[3Ms_Due] Sum
[3Ms_Complete] Sum


Step 5: Total by Provider, Program and System
Add fields to query definition
Enter formulas as new fields in query
Inspect the results of the query
Write down the number of records
Save the query as AP1_S05_001_Total_ByProvider

ProgramI	ProviderSite	Continuous_	CountOfGlobalID	AvgOfDaysInService	3Ms_Due_Sum	3Ms_Comp_Sum	3Ms_PctnComp_ByProvider
1100,Senec	1376790840	Yes	5	544	28	26	92.9
1100,Senec	1447439906	No	1	702	7	7	100
1100,Senec	1447439906	Yes	2	536	11	11	100
1100,Senec	1497061873	Yes	2	198	4	4	100
1100,Senec	1699924654	Yes	1	461	5	4	80
1100,Senec	1730345760	Yes	3	575	17	14	82.4
1100,Senec	1942490487	No	1	536	6	4	66.7
1100,Senec	1942490487	Yes	1	161	1	1	100

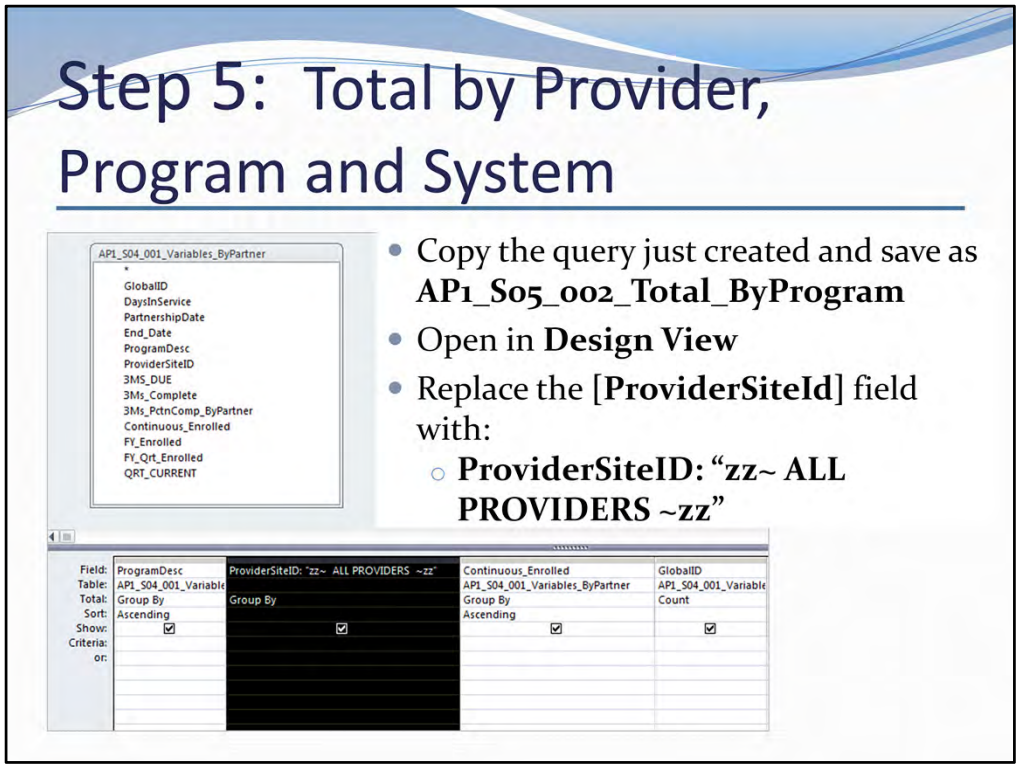
5. Now calculate the percent of 3Ms completed for all partnerships aggregated by each combination of program, provider and continuously enrolled status. Select an empty column of the query definition datasheet, and enter the following formula. In order to avoid dividing by zero when no 3Ms are due for an aggregated group, this formula uses an IIF statement in the formula to insert null values in the results for those cases.

3Ms_PctnComp_ByProvider: IIf(Sum(AP1_S04_001_Variables_ByPartner.[3MS_DUE])=0, Null, Round(100*(Sum(AP1_S04_001_Variables_ByPartner.[3Ms_Complete])/ Sum(AP1_S04_001_Variables_ByPartner.[3MS_DUE])),1))

Select the **Expression** option in the drop-down box of the **Total** row.

6. As seen in this slide, move to the datasheet view to inspect the results of the query. The query should display one record for each combination of provider, program and continuous or discontinuous partnership. Write down the number of records in the query.

7. Save the query as **AP1_S05_001_Total_ByProvider.**



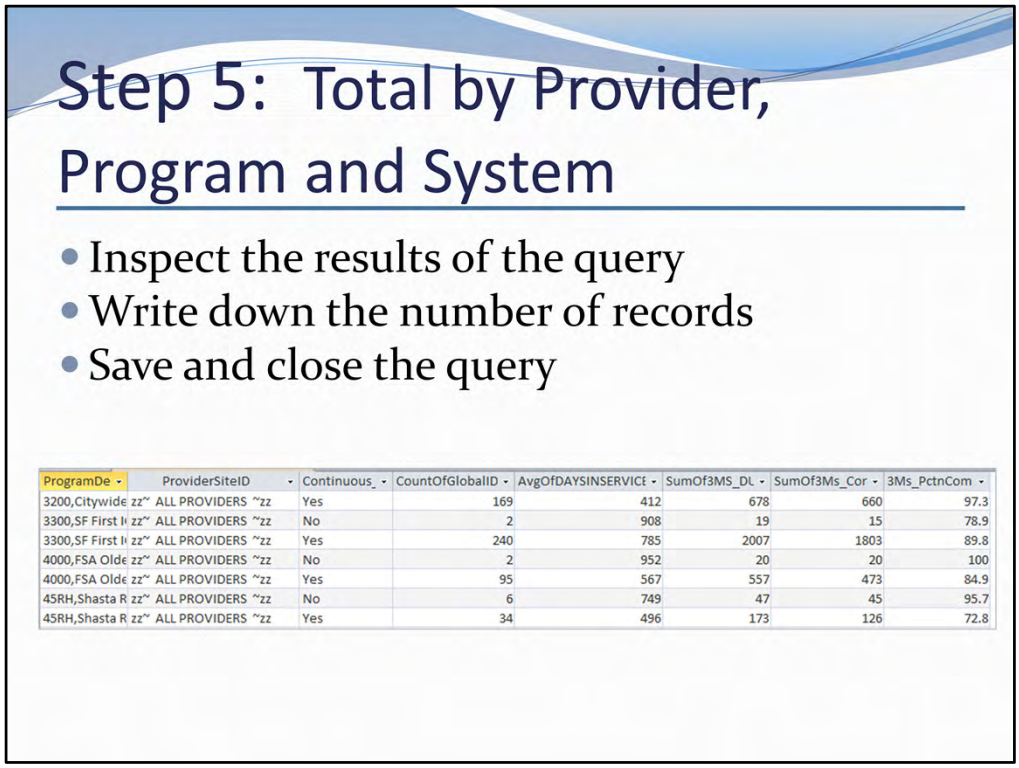
8. Copy and paste the query just created, and name the new query **AP1_S05_002_Total_ByProgram.**

9. Open the new query in **Design View**.

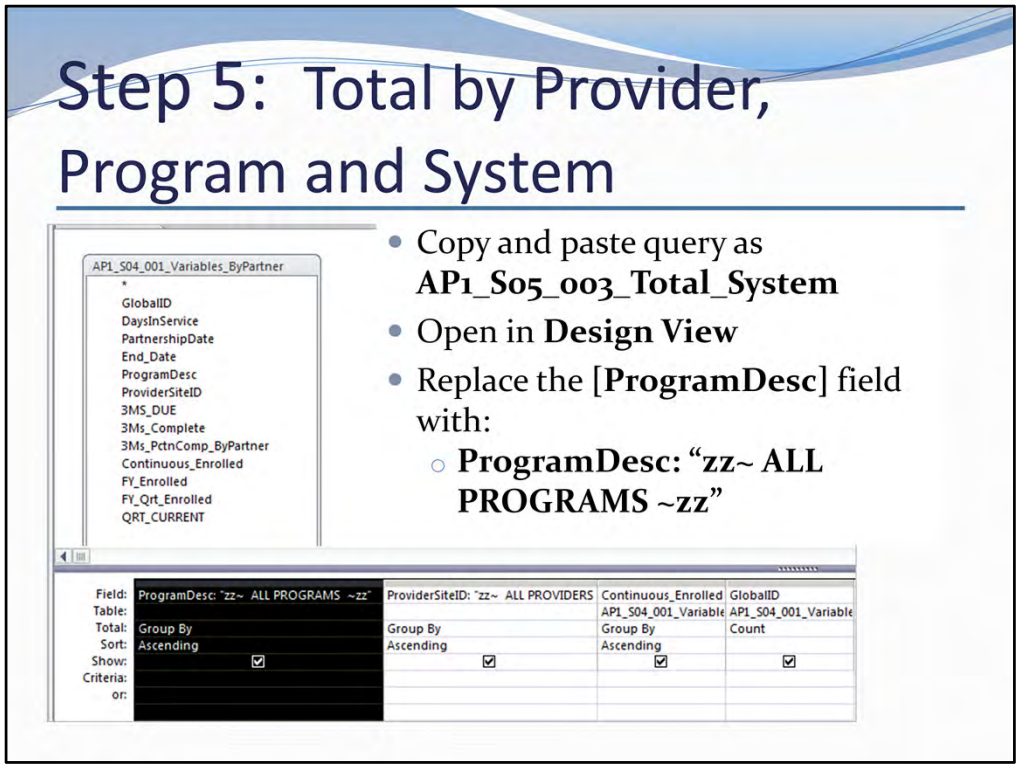
10. Now aggregate the data in this new query by all providers for each program. As seen in this slide, replace the **[ProviderSiteId]** field in the second column of the query definition with the following constant.

ProviderSiteID: "zz~ ALL PROVIDERS ~zz"

The z's in the constant will help sort this summary row to the bottom of all other provider values. Alternatively, a space before the term will sort the row to the top of all providers, if there are no null provider values in your dataset.


Step 5: Total by Provider, Program and System
Inspect the results of the query
Write down the number of records
Save and close the query
ProgramDe ProviderSiteID Continuous_ CountOfGlobalID AvgOfDAYSINSERVICE SumOf3MS_DL SumOf3Ms_Cor 3Ms_PctnCom
3200,Citywide zz~ ALL PROVIDERS ~zz Yes 169 412 678 660 97.3
3300,SF First I zz~ ALL PROVIDERS ~zz No 2 908 19 15 78.9
3300,SF First I zz~ ALL PROVIDERS ~zz Yes 240 785 2007 1803 89.8
4000,FSA Olde zz~ ALL PROVIDERS ~zz No 2 952 20 20 100
4000,FSA Olde zz~ ALL PROVIDERS ~zz Yes 95 567 557 473 84.9
45RH,Shasta R zz~ ALL PROVIDERS ~zz No 6 749 47 45 95.7
45RH,Shasta R zz~ ALL PROVIDERS ~zz Yes 34 496 173 126 72.8

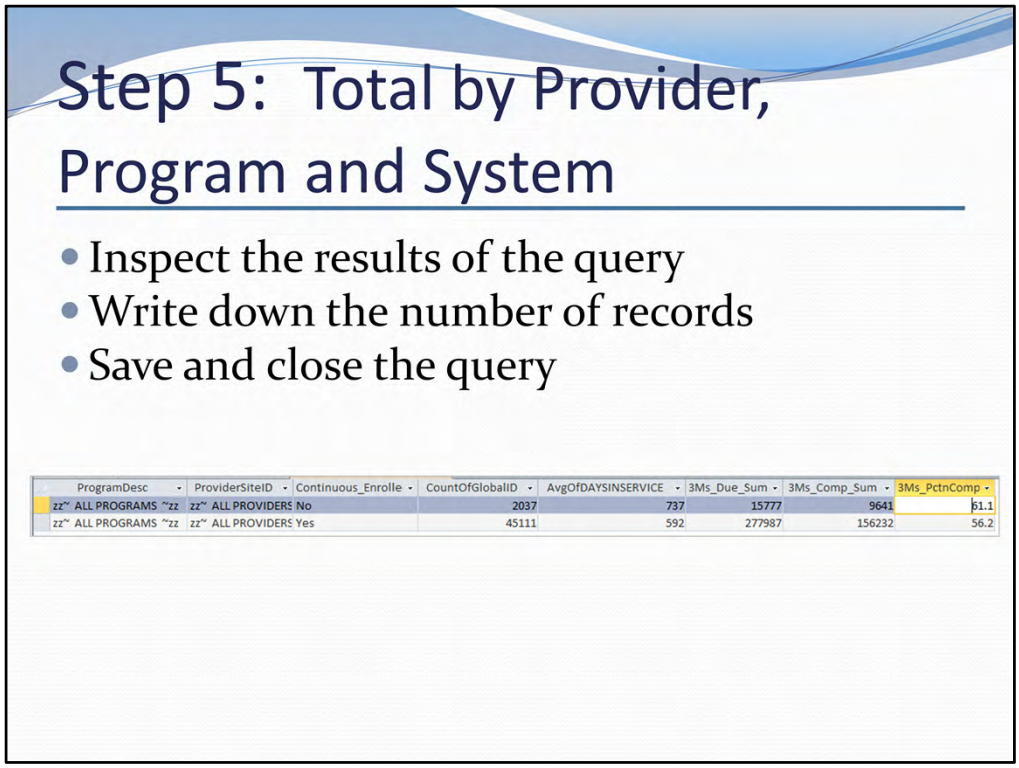
11. As seen in this slide, move to the datasheet view to inspect the results of the query. The query should display one record for each combination of program and discontinuous or continuous partnership. Write down the number of records in the query as reference. Save and close the query.



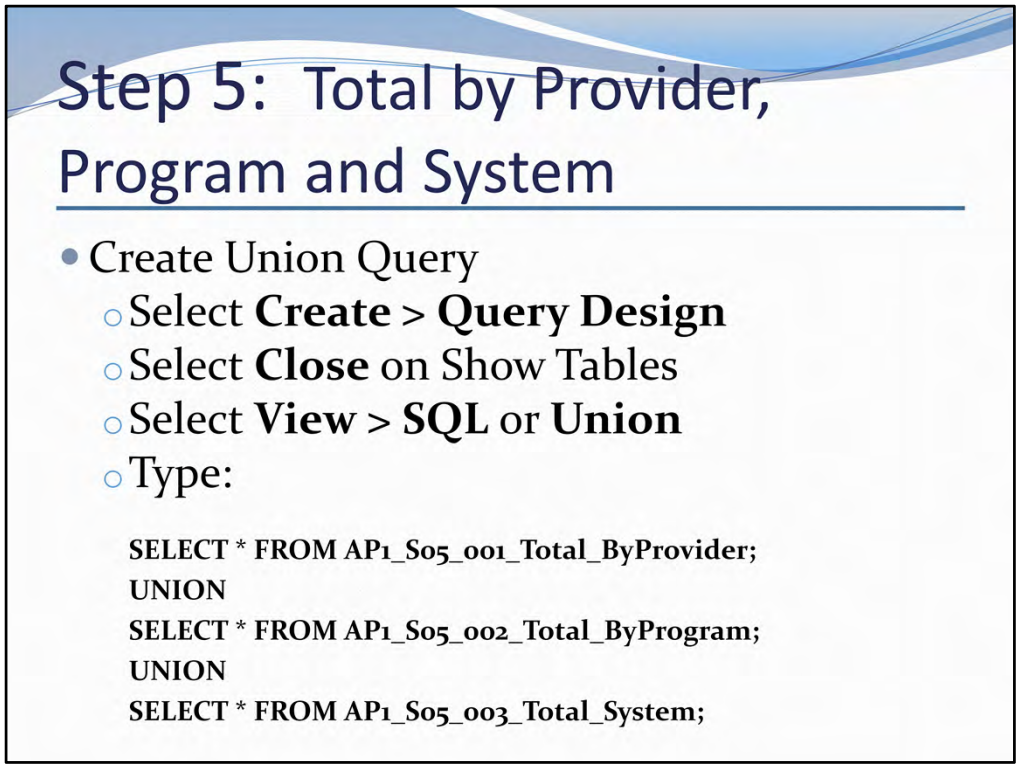
12. Copy and paste the query just created, and name the new query **AP1_S05_003_Total_System.**

13. Open the new query in **Design View**.

14. Now aggregate the data in this new query by the entire system of data. Replace the **[ProgramDesc]** field in the first column of the query definition with the following constant. **ProgramDesc: "zz~ ALL PROGRAMS ~zz"**

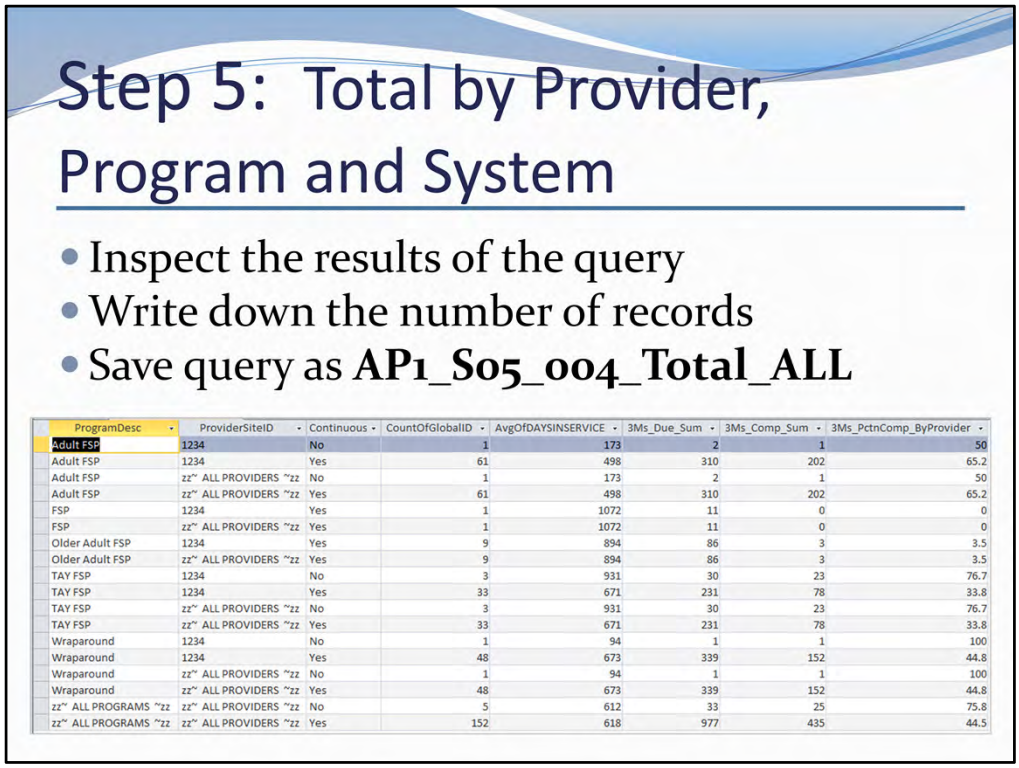

Step 5: Total by Provider, Program and System
Inspect the results of the query
Write down the number of records
Save and close the query
ProgramDesc | ProviderSiteID | Continuous_Enrolle | CountOfGlobalID | AvgOfDAYSINSERVICE | 3Ms_Due_Sum | 3Ms_Comp_Sum | 3Ms_PctnComp
zz~ ALL PROGRAMS ~zz | zz~ ALL PROVIDERS | No | 2037 | 737 | 15777 | 9641 | 61.1
zz~ ALL PROGRAMS ~zz | zz~ ALL PROVIDERS | Yes | 45111 | 592 | 277987 | 156232 | 56.2

15. As seen in this slide, move to the datasheet view to inspect the results of the query. This query will display one record for all continuous partnerships and one record for all discontinuous partnerships in the entire system of data. Write down the number of records in the query as reference. Save and close the query.



16. Create one last query to combine the rows of the previous three queries in this step. Select **Create > Query Design**. Select the **Close** button in the **Show Tables** pop-up, and do not add any tables to the query. Select the **View > SQL** or the **Union** option for the query. Either of these options will redirect you to the **SQL View**. Type or paste the following SQL code to combine the rows in the previous three queries with a union.

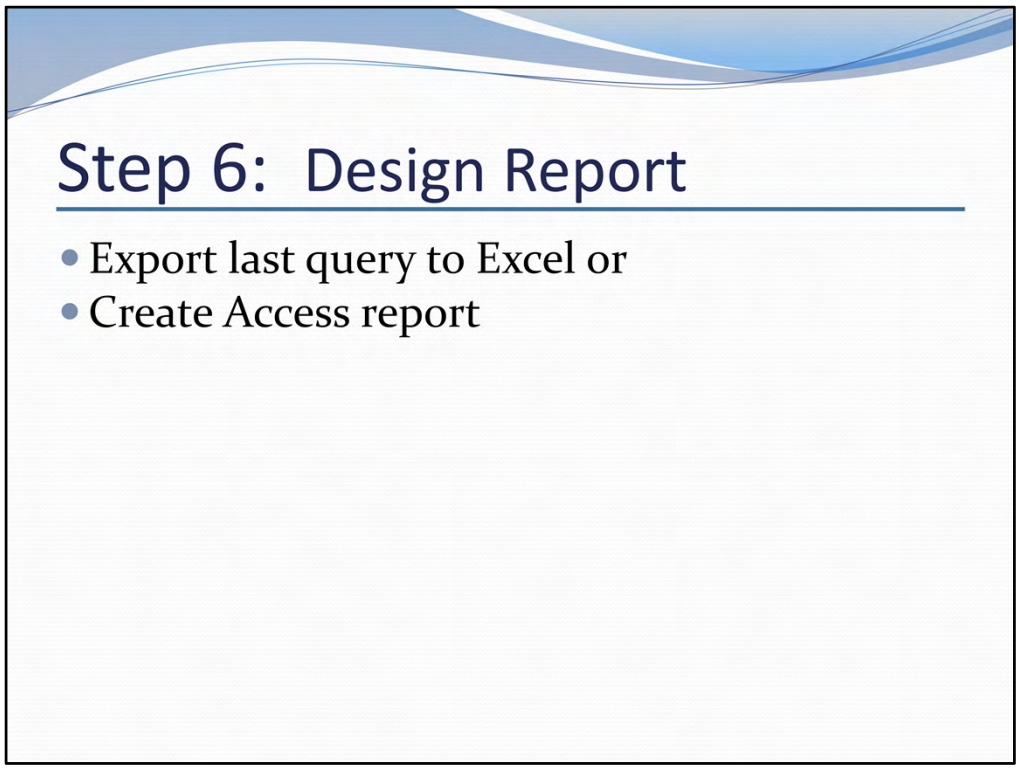
```
SELECT * FROM AP1_S05_001_Total_ByProvider;
UNION
SELECT * FROM AP1_S05_002_Total_ByProgram;
UNION
SELECT * FROM AP1_S05_003_Total_System;
```


Step 5: Total by Provider, Program and System
Inspect the results of the query
Write down the number of records
Save query as AP1_S05_004_Total_ALL

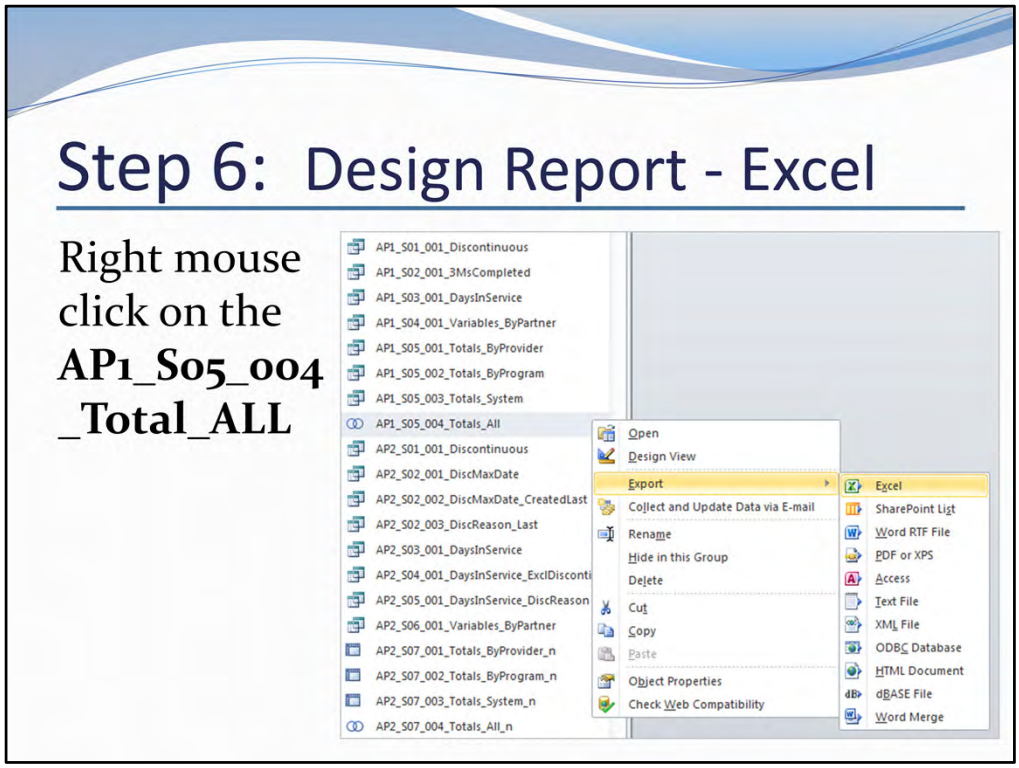
ProgramDesc	ProviderSiteID	Continuous	CountOfGlobalID	AvgOfDAYSINSERVICE	3Ms_Due_Sum	3Ms_Comp_Sum	3Ms_PctnComp_ByProvider
Adult FSP	1234	No	1	173	2	1	50
Adult FSP	1234	Yes	61	498	310	202	65.2
Adult FSP	zz~ ALL PROVIDERS ~zz	No	1	173	2	1	50
Adult FSP	zz~ ALL PROVIDERS ~zz	Yes	61	498	310	202	65.2
FSP	1234	Yes	1	1072	11	0	0
FSP	zz~ ALL PROVIDERS ~zz	Yes	1	1072	11	0	0
Older Adult FSP	1234	Yes	9	894	86	3	3.5
Older Adult FSP	zz~ ALL PROVIDERS ~zz	Yes	9	894	86	3	3.5
TAY FSP	1234	No	3	931	30	23	76.7
TAY FSP	1234	Yes	33	671	231	78	33.8
TAY FSP	zz~ ALL PROVIDERS ~zz	No	3	931	30	23	76.7
TAY FSP	zz~ ALL PROVIDERS ~zz	Yes	33	671	231	78	33.8
Wraparound	1234	No	1	94	1	1	100
Wraparound	1234	Yes	48	673	339	152	44.8
Wraparound	zz~ ALL PROVIDERS ~zz	No	1	94	1	1	100
Wraparound	zz~ ALL PROVIDERS ~zz	Yes	48	673	339	152	44.8
zz~ ALL PROGRAMS ~zz	zz~ ALL PROVIDERS ~zz	No	5	612	33	25	75.8
zz~ ALL PROGRAMS ~zz	zz~ ALL PROVIDERS ~zz	Yes	152	618	977	435	44.5

17. Move to the datasheet view to inspect the results of the query. The number of records should equal the sum of records from the previous three queries created in this step.

18. Save the query as **AP1_S05_004_Total_ALL.**



The last step in this process is to design the report. The final query, **AP1_S05_004_Total_ALL,** holds all of the data for the final table. This query can be exported into Microsoft Excel for formatting or into Microsoft Access to create a report template.

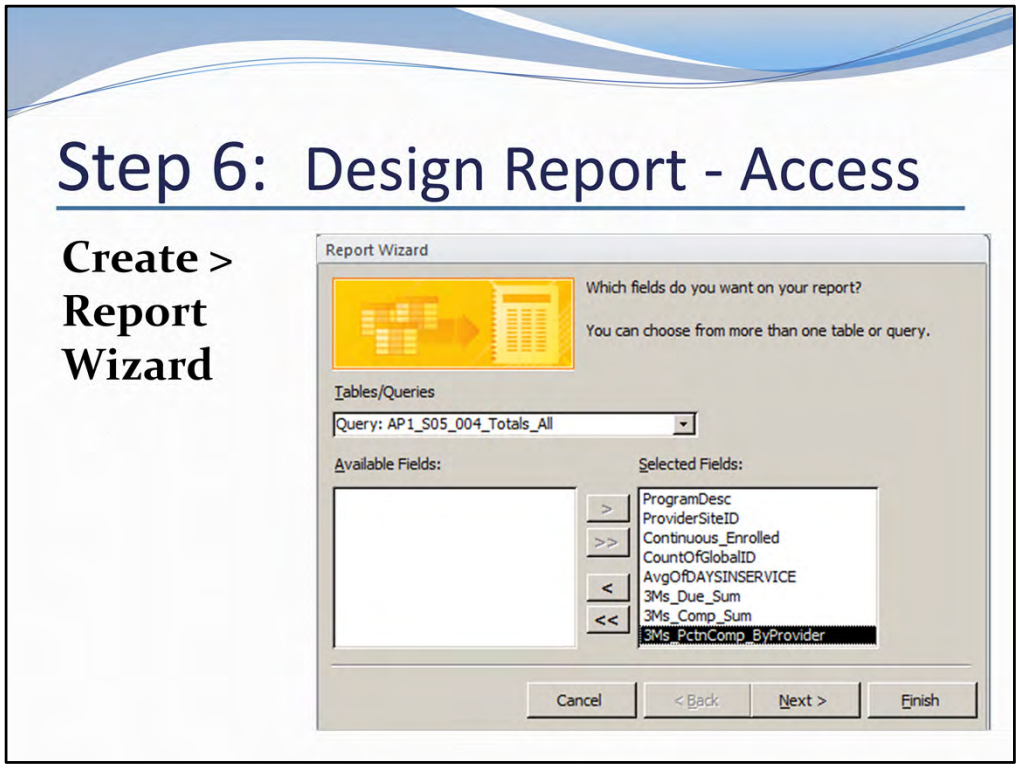


1. With the PLD Templates open in Microsoft Access, right mouse click on the **AP1_S05_004_Total_ALL** and choose **Export > Excel**, as seen in this slide.

2. Provide a file name and browse to a location to save the Excel file.

3. Select **Export data with formatting and layout** and select **Open the destination file after the export operation is complete.** Click **OK.**

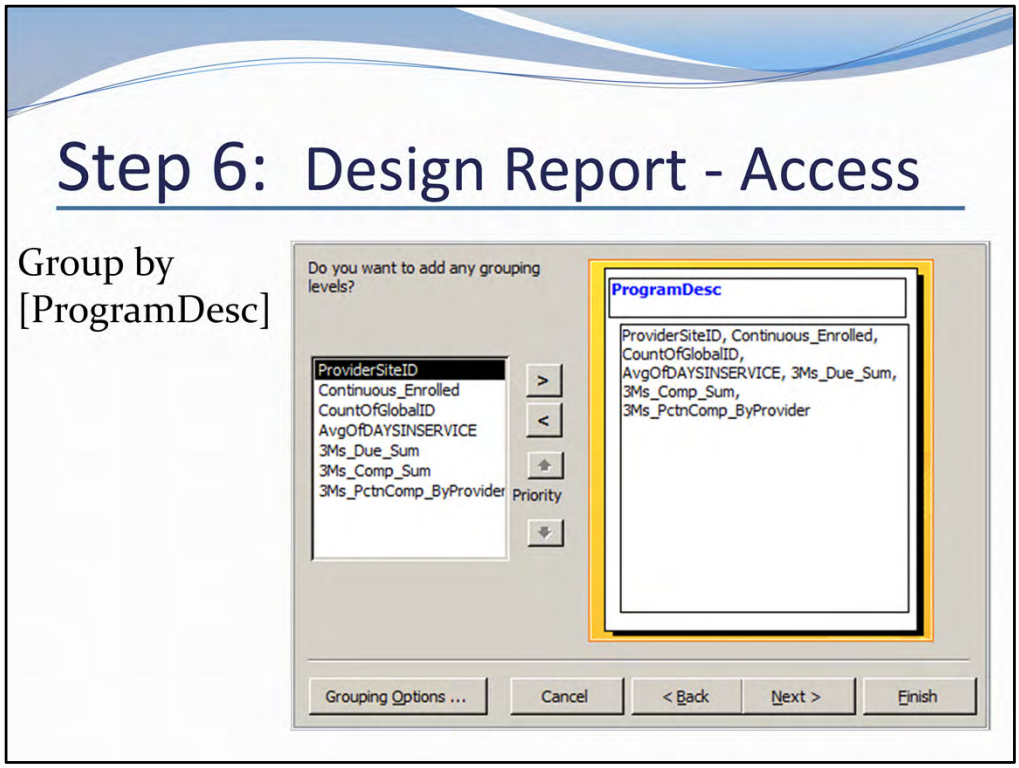
4. Your data is now in Microsoft Excel, and can be formatted for inclusion in a Microsoft Word report.



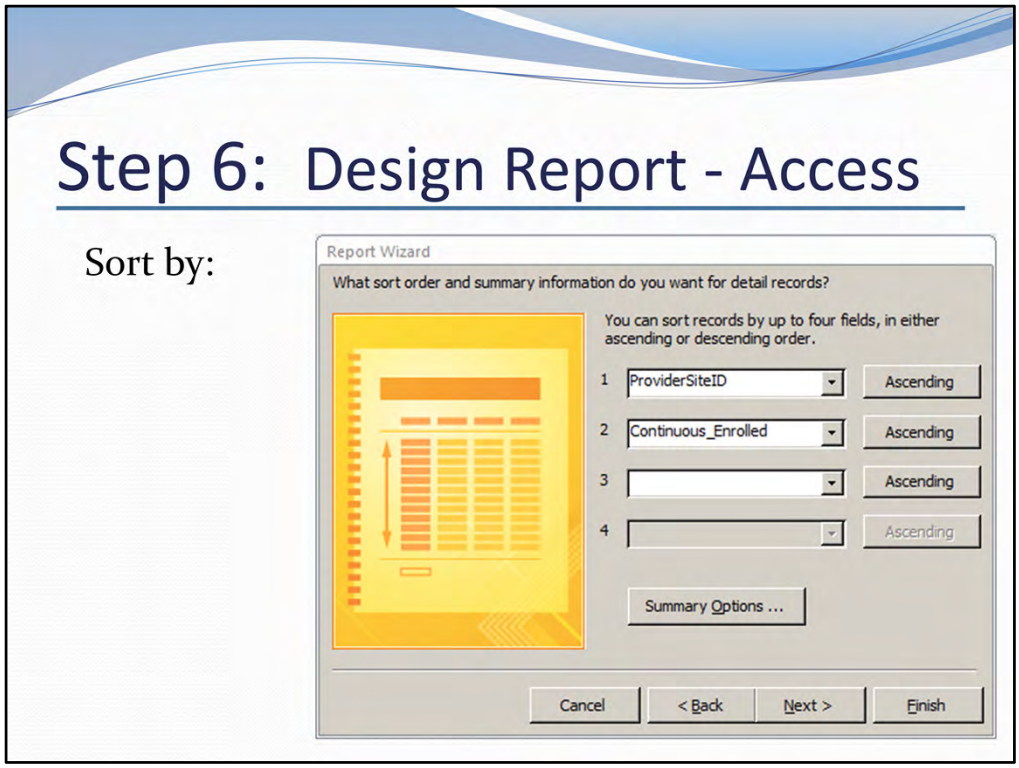
Alternatively, a report template can be created in Microsoft Access.

1. With the PLD Templates open in Microsoft Access, click once on the **AP1_S05_004_Total_ALL** query to highlight the query. Choose **Create > Report Wizard** in the report section of the menus**.** As seen in this slide, the selected query should show in the wizard. If the desired query is not showing in the drop-down box, then select the drop-down and locate the correct query.

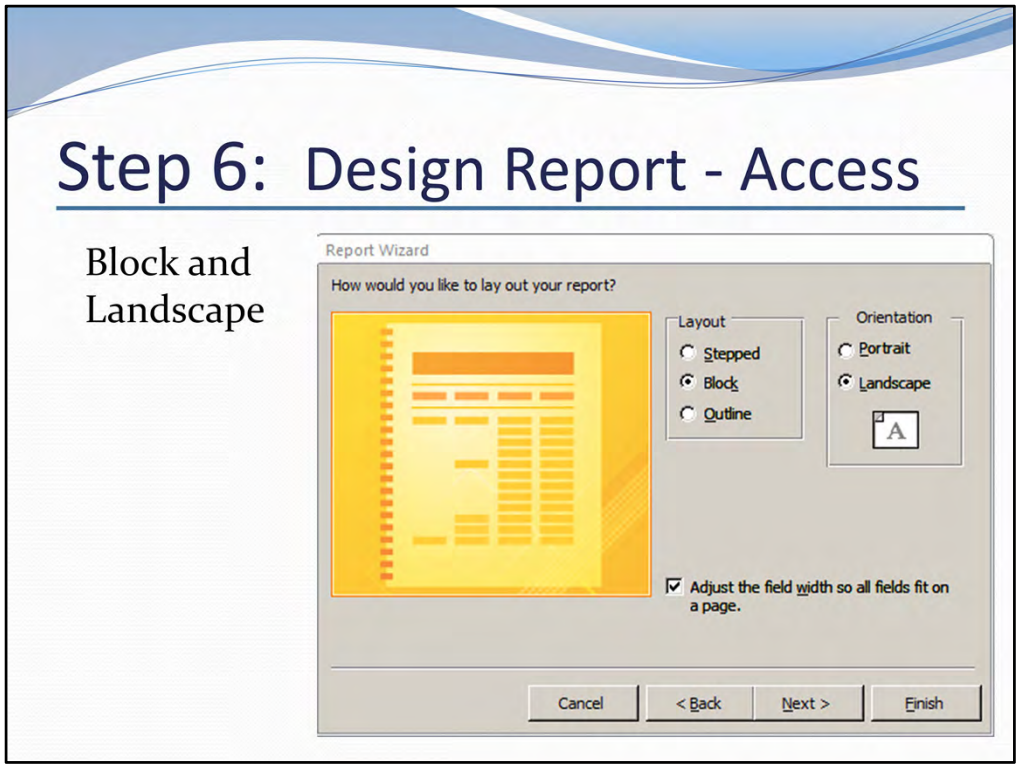
2. As seen in this slide, select the **>>** button to move the entire set of fields into the **Selected Fields** box. Click **Next**.



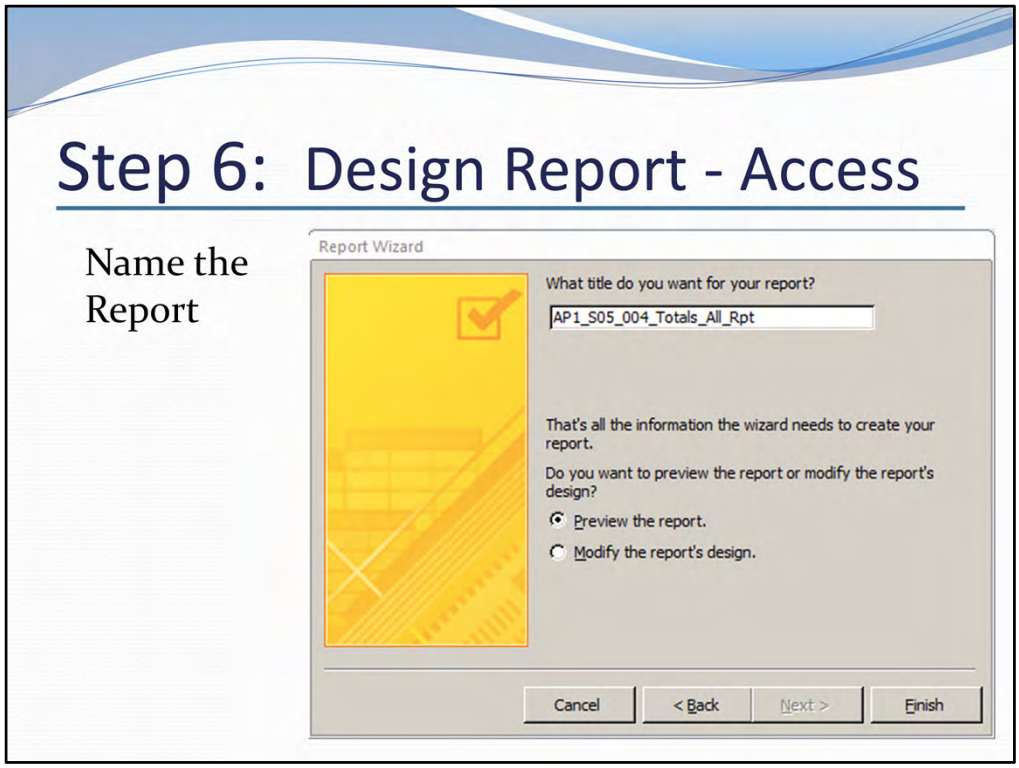
3. As seen in this slide, select the **[ProgramDesc]** and then select the **>** button to group the report sections by program. Select **Next**.



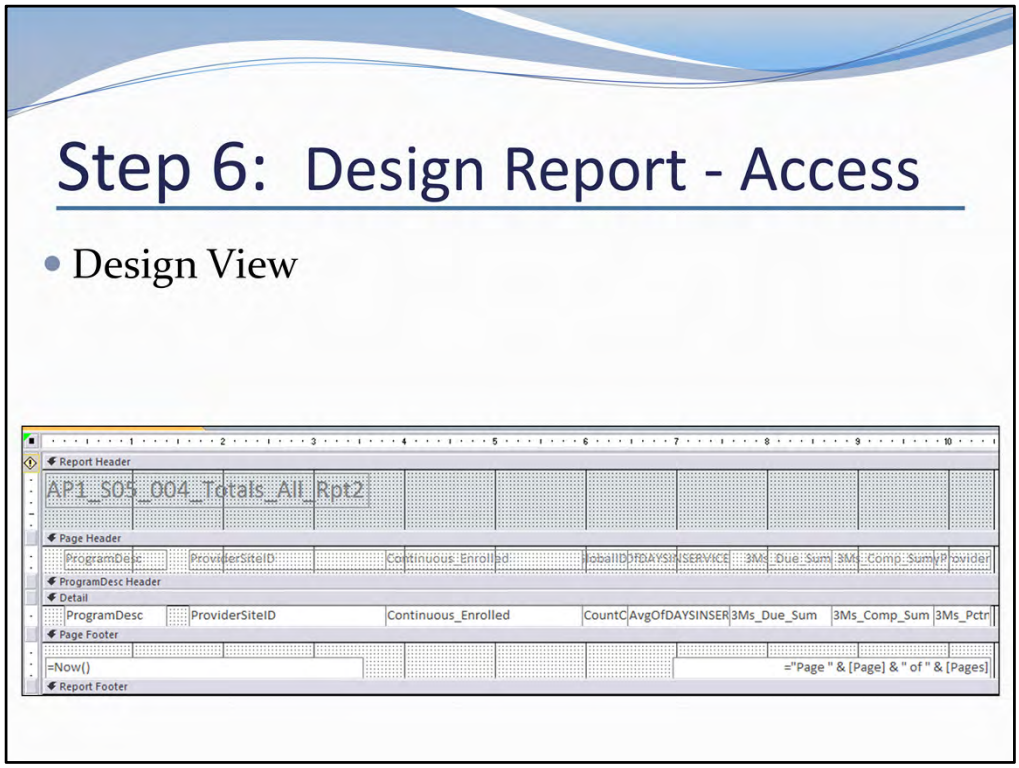
4. As seen in this slide, select to sort by **[ProviderSiteID]** and then **[Continuous_Enrolled]** fields from the drop-down boxes. Click **Next**.



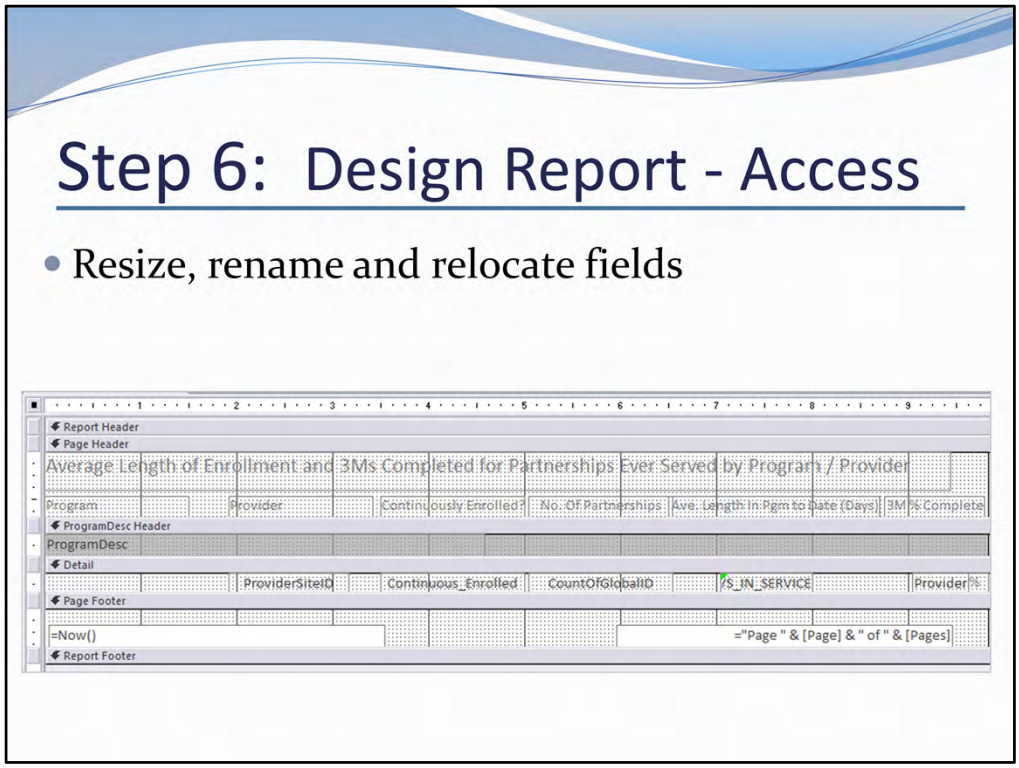
5. As seen in this slide, select the **Block** layout and select the **Landscape** orientation. Click **Next**.


Step 6: Design Report - Access
Name the Report
Report Wizard
What title do you want for your report?
AP1_S05_004_Totals_All_Rpt
That's all the information the wizard needs to create your report.
Do you want to preview the report or modify the report's design?
Preview the report.
Modify the report's design.
Cancel
< Back
Next >
Finish

6. As seen in this slide, name the report **AP1_S05_004_Total_ALL_Rpt**. Click **Finish**.



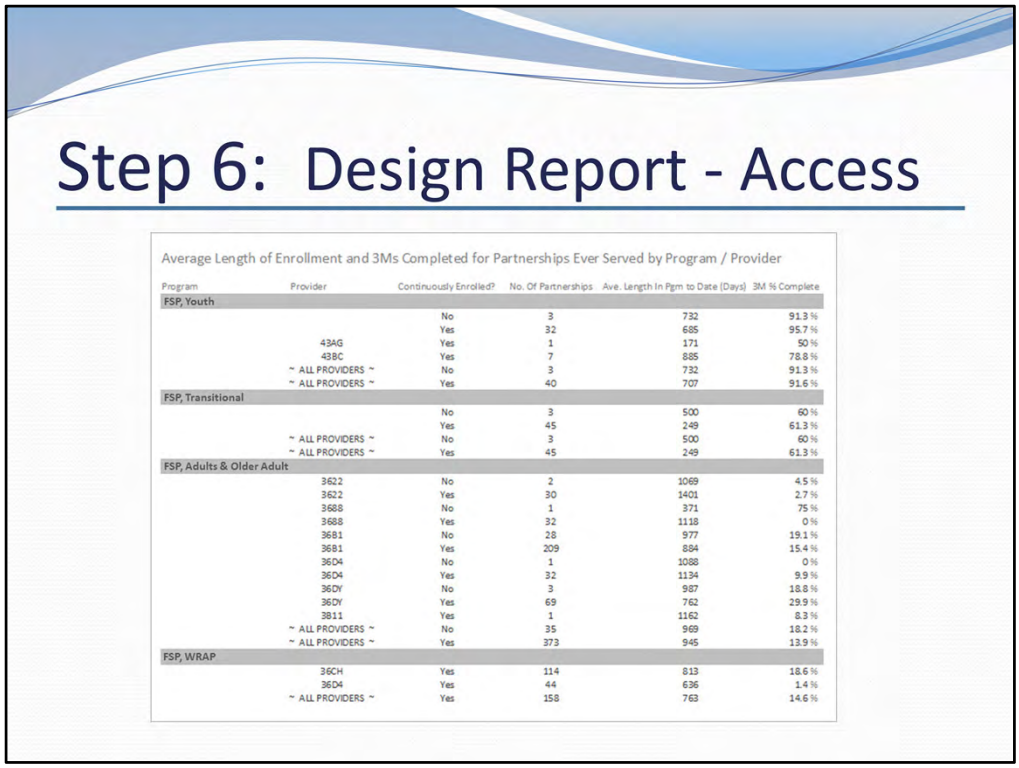
7. As seen in this slide, move to the **Design View** to change the design of the report. After the wizard creates the report, the report format can be optimized by rearranging the location of the fields.



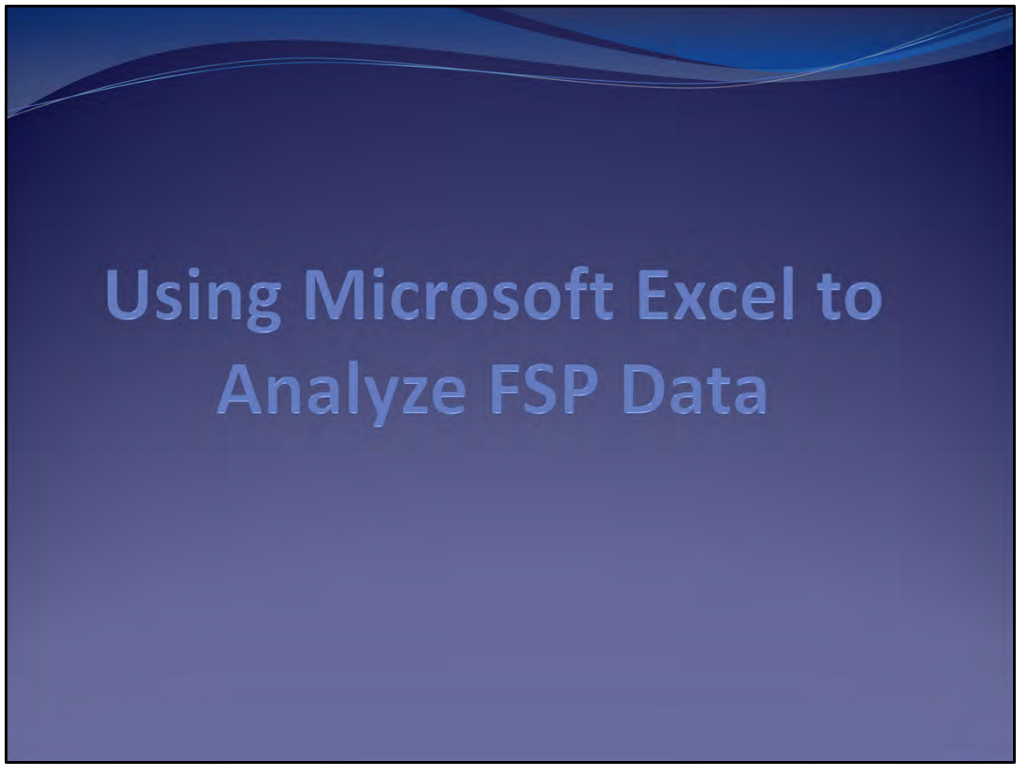
8. As seen in this slide you can resize, rename and relocate the fields and labels to match the following design or another format as desired. The following steps provide a quick overview of the steps required to change the report from the layout in the previous slide to this slide.

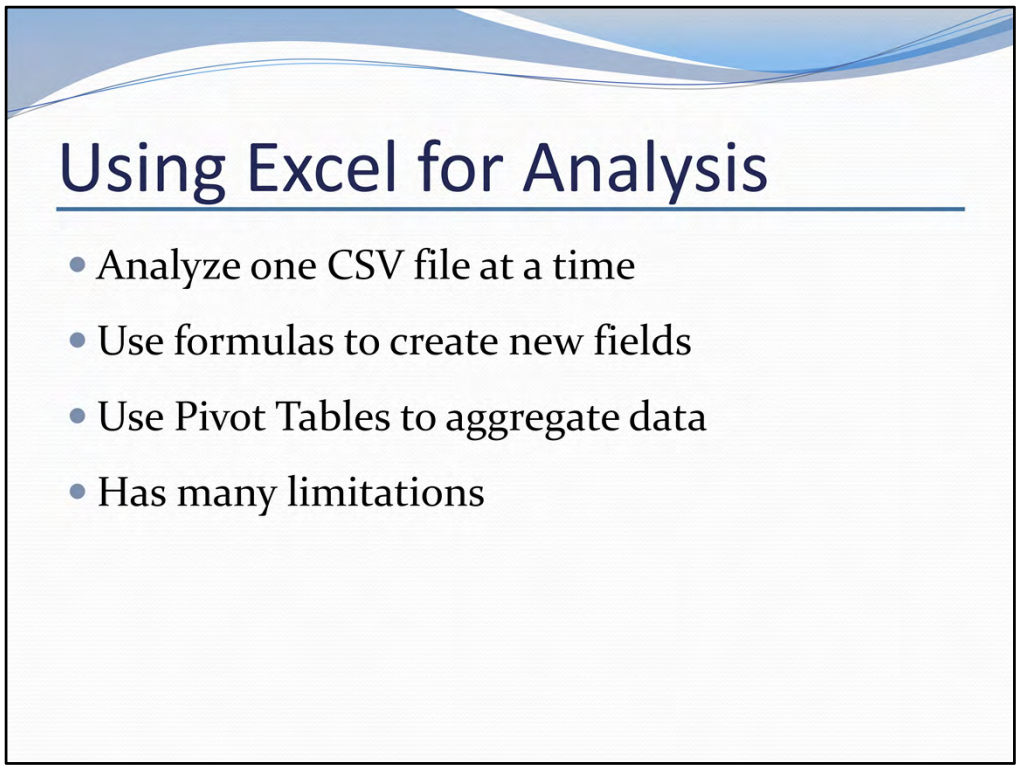
• Click in the label in the **Report Header** section and rename the report title.
• Click on each of the labels in the **Page Header** section and rename each label to match the new label titles in this slide.
• Hold the **Shift** key to simultaneously select all labels in the **Page Header** section, and move the labels down in the section to make room for the report title label. Click and drag to arrange each label in the **Page Header** section to match the layout in this slide.
• Drag and drop the report title from the **Report Header** section to the **Page Header** section.
• Minimize the size of the **Report Header** section by clicking and dragging upward on the lower section separator bar.
• Lengthen the **ProgramDesc Header** section by clicking and dragging downward on the lower section separator bar.
• Drag the **[ProgramDesc]** field from the **Detail** section to the **ProgramDesc Header** section.
• Select on the **ProgramDesc** Header bar and right-click and select **Properties** to display the properties window on the right side of the screen. In the **Format** tab, select the **Back Color** to be gray. Set the **Alternate Back Color** to be **No Color**.
• Select on the **Detail** bar, and in the **Format** tab of the **Properties** window, select the

Alternate Back Color to be **No Color**.
• Select the **[ProgramDesc]** field and in the **Properties** window, set the **Width** to 4” and set the **Back Style** to **Transparent**.
• Select each field in the **Detail** section and click and drag the left edges to resize the fields to resemble this slide.
• Align the fields in the **Detail** section underneath the corresponding label from the **Page Header** section.

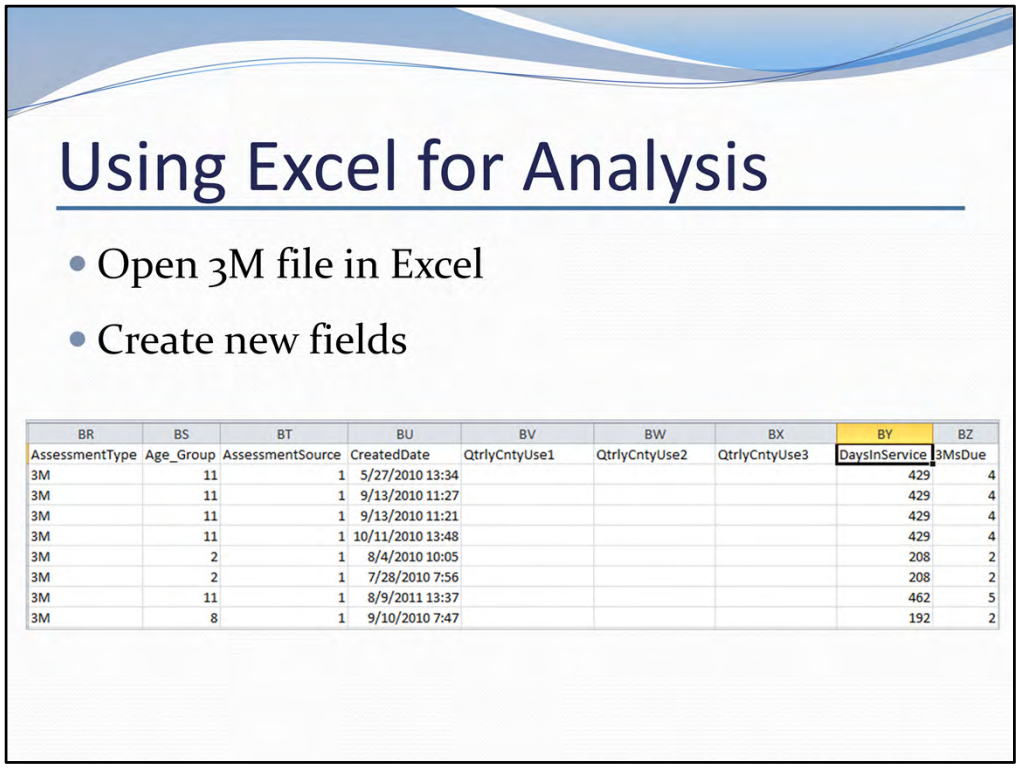

Step 6: Design Report - Access
Average Length of Enrollment and 3Ms Completed for Partnerships Ever Served by Program / Provider
Program Provider Continuously Enrolled? No. Of Partnerships Ave. Length In Pgm to Date (Days) 3M % Complete
FSP, Youth
No 3 732 91.3 %
Yes 32 685 95.7 %
43AG Yes 1 171 50 %
43BC Yes 7 885 78.8 %
~ ALL PROVIDERS ~ No 3 732 91.3 %
~ ALL PROVIDERS ~ Yes 40 707 91.6 %
FSP, Transitional
No 3 500 60 %
Yes 45 249 61.3 %
~ ALL PROVIDERS ~ No 3 500 60 %
~ ALL PROVIDERS ~ Yes 45 249 61.3 %
FSP, Adults & Older Adult
3622 No 2 1069 4.5 %
3622 Yes 30 1401 2.7 %
3688 No 1 371 75 %
3688 Yes 32 1118 0 %
3681 No 28 977 19.1 %
3681 Yes 209 884 15.4 %
36D4 No 1 1088 0 %
36D4 Yes 32 1134 9.9 %
36DY No 3 987 18.8 %
36DY Yes 69 762 29.9 %
3811 Yes 1 1162 8.3 %
~ ALL PROVIDERS ~ No 35 969 18.2 %
~ ALL PROVIDERS ~ Yes 373 945 13.9 %
FSP, WRAP
36CH Yes 114 813 18.6 %
36D4 Yes 44 636 1.4 %
~ ALL PROVIDERS ~ Yes 158 763 14.6 %

9. View the report in print preview. If formatted following the directions listed previously, the report will resemble the example displayed in this slide. Adjust the orientation and margins for printing as desired.


Using Microsoft Excel to Analyze FSP Data


Using Excel for Analysis
Analyze one CSV file at a time
Use formulas to create new fields
Use Pivot Tables to aggregate data
Has many limitations

A limited amount of analysis can be performed in Microsoft Excel alone. A single CSV file can be imported, and Microsoft Excel's pivot table can aggregate and summarize the information. While Microsoft Excel does not have the functionality to create report templates from the information in multiple CSV files, Microsoft Excel can calculate the length in program, number of 3Ms due and completed, and percent of 3Ms complete for all partners in a file. However, since the following analysis is from the 3M CSV file, a partner must have had at least one 3M completed to exist in the file and be included in this analysis. Partners without 3Ms would need to be identified separately from the PAF file.



BR	BS	BT	BU	BV	BW	BX	BY	BZ
AssessmentType	Age_Group	AssessmentSource	CreatedDate	QtrlyCntyUse1	QtrlyCntyUse2	QtrlyCntyUse3	DaysInService	3MsDue
3M	11	1	5/27/2010 13:34				429	4
3M	11	1	9/13/2010 11:27				429	4
3M	11	1	9/13/2010 11:21				429	4
3M	11	1	10/11/2010 13:48				429	4
3M	2	1	8/4/2010 10:05				208	2
3M	2	1	7/28/2010 7:56				208	2
3M	11	1	8/9/2011 13:37				462	5
3M	8	1	9/10/2010 7:47				192	2

1. Open the DCR 3M CSV file in Microsoft Excel.

2. As seen in this slide, select the first empty column of the spreadsheet (e.g., BY) and create a new heading called **DaysInService**. In the cell below the heading, type in a formula to calculate the number of days in service to the end date. Since Microsoft Excel uses cell locations and not field names to perform calculations, the formula appears below with field definitions and then as an actual example formula used in Microsoft Excel. The formula first identifies if the partnership status is 0, signifying the partnership has ended, and in this case calculates the days in service by subtracting the partnership date from the date the partnership ended. Then in the cases in which the partnership has not ended, the days in service are calculated by subtracting partnership date from the end date defined when the CSV file was downloaded from the DCR.

Formula Definition: **=IF([PartnershipStatus]=0, [DatePartnershipStatusChange]-[PartnershipDate], “Date of Download”- [PartnershipDate])**

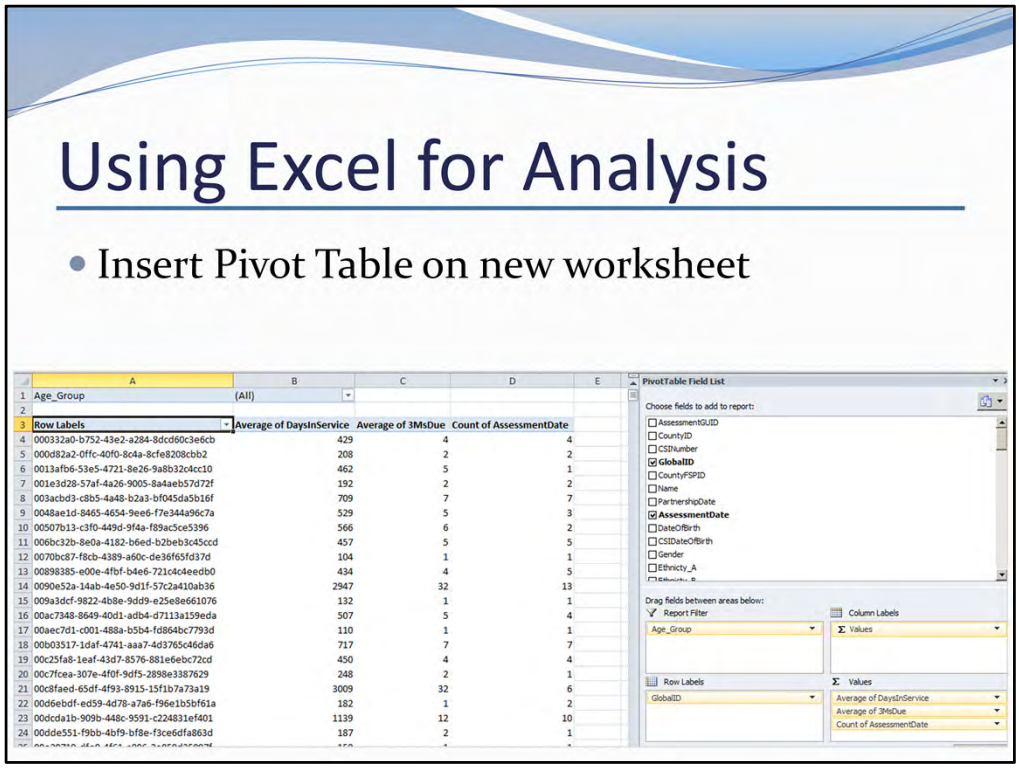
Formula Example: **=IF(U2=0,T2-G2,"10/6/2011"-G2)**

3. As seen in this slide, copy and paste the formula down all of the rows of data.

4. As seen in this slide, select the next empty column of the spreadsheet (e.g., BZ) and create a new heading called 3Ms Due. In the cell below the heading, type the formula below to calculate the approximate amount of 3Ms due. The following formula divides the

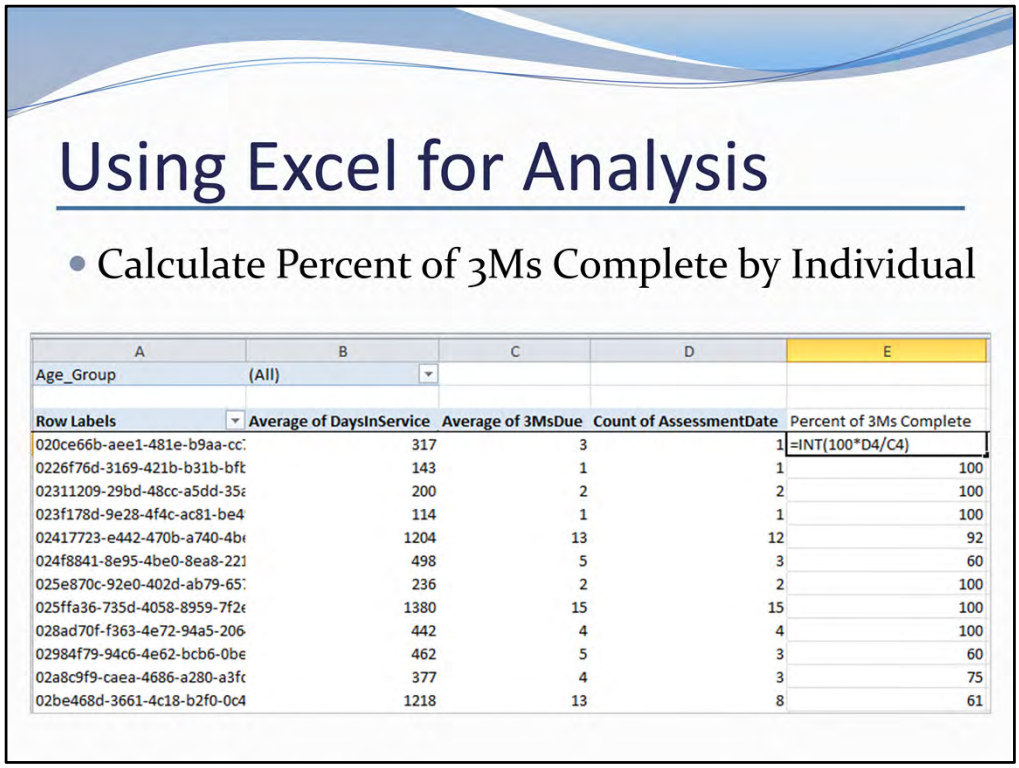
number of days in service by the number of days in a quarter (365.25/4 = the number of days in a quarter) and returns the integer (INT) of completed quarters in service.

Formula Definition: **=INT([DaysInService]/(365.25/4))**
Formula Example: **=INT(BY2/(365.25/4))**



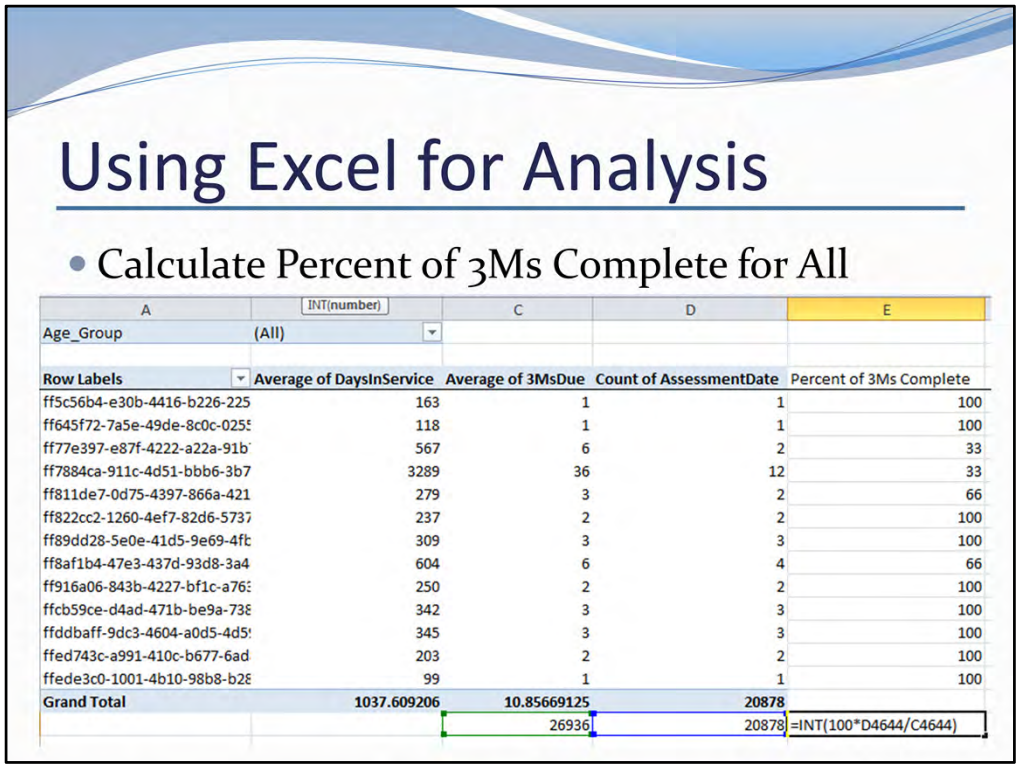
5. Select anywhere within the data in the spreadsheet and choose to insert a pivot table into a new worksheet by selecting **Insert > Pivot Table** from the menus. The data selection will expand to the entire table of data within the spreadsheet.

6. This step will summarize the number of 3Ms completed and 3Ms due for each partner. Add the field **[Age_Group]** to the **Report Filter** box. Add the field **[GlobalID]** to the **Row Labels** box. Add the **[DaysInService]** to the **Values** box and change the **Value Field** setting to **Average**. Add the **[3MsDue]** to the **Values** box and change the **Value Field** setting to **Average**. Add the **[AssessmentDate]** to the **Values** box and change the **Value Field** setting to **Count**.

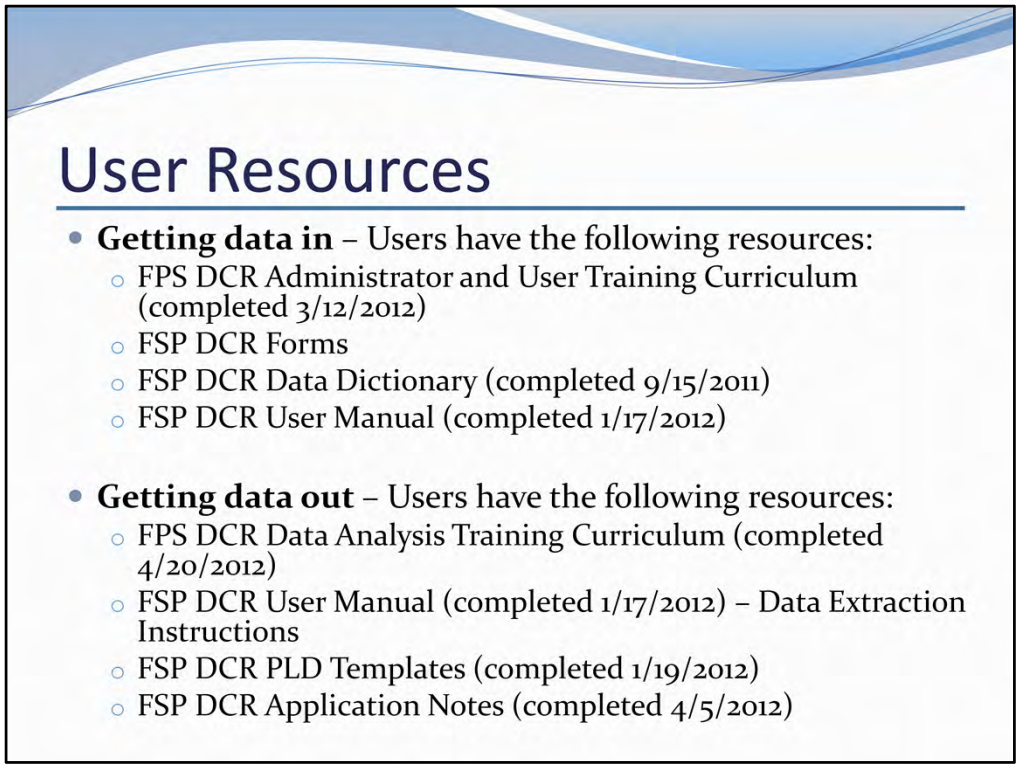


	A	B	C	D	E
1	Age_Group	(All)			
2					
3	Row Labels	Average of DaysInService	Average of 3MsDue	Count of AssessmentDate	Percent of 3Ms Complete
4	020ce66b-aee1-481e-b9aa-cc	317	3	1	=INT(100*D4/C4)
5	0226f76d-3169-421b-b31b-bf	143	1	1	100
6	02311209-29bd-48cc-a5dd-35	200	2	2	100
7	023f178d-9e28-4f4c-ac81-be4	114	1	1	100
8	02417723-e442-470b-a740-4b	1204	13	12	92
9	024f8841-8e95-4be0-8ea8-221	498	5	3	60
10	025e870c-92e0-402d-ab79-65	236	2	2	100
11	025ffa36-735d-4058-8959-7f2	1380	15	15	100
12	028ad70f-f363-4e72-94a5-206	442	4	4	100
13	02984f79-94c6-4e62-bcb6-0be	462	5	3	60
14	02a8c9f9-caea-4686-a280-a3f	377	4	3	75
15	02be468d-3661-4c18-b2f0-0c4	1218	13	8	61

7. To calculate the individual percent of 3Ms completed by partner, divide the value in column D by the value in column C for each partner, multiply by 100 and take the integer. As seen in this slide, select cell E4 and type the following formula: =INT(100*D4/C4). Select Enter to exit the cell, and then copy the formula down column E to the end of the dataset.



8. To calculate the total percent of 3Ms completed for all partners, sum all of the values in column D and divide by the sum of values in column C. As seen in this slide, the end of the data in column C, type the formula =sum(C4:C#), where # is the row number for the last partner in the pivot table. At the end of the data in column D, type the formula =sum(D4:D#), where # is the row number for the last partner in the pivot table. In the same row at column E, type in the formula =int(100*D#/C#), where # where the previous formulas were entered.


User Resources
Getting data in – Users have the following resources:
FPS DCR Administrator and User Training Curriculum (completed 3/12/2012)
FSP DCR Forms
FSP DCR Data Dictionary (completed 9/15/2011)
FSP DCR User Manual (completed 1/17/2012)
Getting data out – Users have the following resources:
FPS DCR Data Analysis Training Curriculum (completed 4/20/2012)
FSP DCR User Manual (completed 1/17/2012) – Data Extraction Instructions
FSP DCR PLD Templates (completed 1/19/2012)
FSP DCR Application Notes (completed 4/5/2012)

This FSP DCR Data Analysis Training Curriculum covered the data extraction instructions in the FSP DCR User Manual (completed 1/17/2012), and the training provided instruction for utilizing the FSP DCR PLD Templates and User Manual (completed 1/19/2012) to view a summary of a partner's data. The training also reviewed the FSP DCR Application Notes (completed 4/5/2012) which provide instruction for creating specific reports from the DCR CSV data extraction files.

There are additional resources covering aspects of extracting and analyzing the FSP DCR data. The FSP DCR Administrator and User Training Curriculum provides an overview of the FSP DCR Forms, FSP DCR Data Dictionary (completed 9/15/2011) and FSP DCR User Manual (completed 1/17/2012) . The FSP DCR Administrator and User Training Curriculum is available for download as a PowerPoint presentation and a handout with presenter's notes. Trainers can use this curriculum to provide training internally to new staff using the FSP DCR.

FSP Data Analysis Training
This training was funded by the Mental Health Services Oversight and Accountability Commission (MHSOAC).